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PlanSwift 9 User Manual

PlanSwift 9.0 - What's New?

Article Number: 336 | Rating: Unrated | Last Updated: Sep 24, 2010 at 10:32 AM

Whats New in Professional Release 9.0

General:

- Undo! - now you can undo most changes.
- When emailing plans to other users, the ability to select individual pages from the list.
- Add columns to the "Open Job" dialog...example "Estimator" or "Due Date"

Interface:

- All new ribbon bar - more efficient use of the toolbar space
- Quick Search - search all commands in the ribbon bar, plus searching your current estimates, and templates at the same time
- New "Notes" sidebar...see all notes on the job in 1 place
- New docking system - (windows don't get lost)
- Multi-select capability - hold SHIFT or CTRL to select multiple items
- Color themes...Black, Blue, Silver

Navigation:

- Hyperlinks. Click hyperlinks on the page to either navigate to a URL or function as a bookmark to another page
- Search the pages window
- Folder structure for images: Now the user can group images in folders, such as "Architectural", "Structural", "Civil", etc.
- "Tabbed" browsing. Open multiple images at the same time...overall the software feels more like a "browser" for blueprint images, with powerful capabilities. Dock or undock tabs and move to additional monitors
- Hover navigation: Hover over arrows (up, down, left, right) to pan around the page (perfect for touch screens too)
- Takeoff / Image
- Templates

Lists:

- Database integration: Ability to create custom lists (example: Items, Customers, Divisions, etc.) that can be linked to database

Estimating:

- Database Integration: Link PlanSwift to any existing ADO compatible database (including Excel, SQL Server, MS Access) for Price Lists, Customer Lists, etc.
- Object oriented estimating (with Object Inheritance): We are introducing a new concept here. Each estimating assembly or formula can be "inherited" to other similar items allowing powerful plugins to be created with "Smart" functionality while digitizing.
- Modify item properties directly from the estimating screen
- Automatic units conversions - Enter values in IN, FT, M, CM, or any measurement type and it gets automatically gets converted

Reporting:

- Reporting: Greatly enhanced reporting capabilities. Sort & group the data any way you want, and save pre-built "Views"
- Calculated Column - ability to create a column that is stored only on the report (not on the items) and calculates on the fly
- Customizable page layout for reports (add logo, etc.)
- Modify item properties directly from the reports screen
- Excel 2010 Compatibility for the Live Excel integration

Language / International:

- Better metric compatibility
- Language Packs - Ability for the software to operate in multiple languages

Properties

- New Property/Field Types: CheckBox, Color, Memo, Image, Path, Slider Bar, and more (store these properties on any item)
- Friendly "Input" screen when editing properties
- Form Designer: Ability to give templates friendly form inputs by using the form designer

Development Platform

- New Concept of "Storages": Allows the user to control where their job data and templates are stored (folder on HD, in a database, in XML file, etc.)
- Much more open architecture - Every object (page, bookmark, area, linear, count, template....anything....has it's own XML based set of properties for storing/tagging additional information to. Perfect for plugins to piggypack on PlanSwift architecture)
- Ability to embed/integrate 3rd party apps into the software as a seamless solution (appearing as 1 software)
- Ability for Events/Methods to launch Executable Plugins

- New Script Editor window with built-in help files

Help / Support

- More integrated experience

Misc:

- Parts show what type of takeoff item they need dropped onto
- Export to Excel "Report": Ability to define a "Report" from an Excel template (such as Invoice/Estimate), and have it populated with Data from PlanSwift (this is different functionality than the existing Live Excel integration)
- SwiftMarket integration: The most powerful tool for buying and selling construction materials and services, now linked into the #1 takeoff software.

Posted Mike Ramsey - Jun 10, 2010 at 2:34 PM. This article has been viewed 6547 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=336

Integrated Solutions

What is an Integrated Solution

Article Number: 2283 | Rating: 1/5 from 2 votes | Last Updated: Jun 17, 2013 at 2:24 PM

Integrated solutions are advanced integrations into third party systems as well as specialized editions of PlanSwift. This section of the knowledge base focuses on these features and how to use them.

Posted Mike Ramsey - Jun 17, 2013 at 2:24 PM. This article has been viewed 1768 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2283

PLASMA

Installing PLASMA

Article Number: 2282 | Rating: Unrated | Last Updated: Jun 17, 2013 at 2:46 PM

This article will explain how to install the PLASMA plugin to PlanSwift. The assumption is that PlanSwift is already installed on the end users local machine.

**** PLASMA Requires PlanSwift version 9.5 to function**

1. With PlanSwift open navigate to the '**Plugin Store**' tab on the main ribbon bar.

2. Click on the button that says '**Import Plugin Package**'.

3. Navigate to the location of the plugin package installation file named '**Plasma.SwiftPluginPackage**'.

Posted Mike Ramsey - Jun 17, 2013 at 2:21 PM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2282

General Q & A

What do i do if I forgot my PIN#?

Article Number: 1826 | Rating: Unrated | Last Updated: Aug 9, 2011 at 10:15 AM

Question:

What do i do if I forgot my PIN#?

Answer:

You can go here to retrieve your PIN - Resend PIN Information
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Posted Mike Ramsey - Aug 8, 2011 at 3:38 PM. This article has been viewed 2223 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1826

Rename Job - Hi, I want to rename a job in Planswift 9...how do I do this? Or, if I want to update a current job but keep the original so I save the changes as a revision how do I do this?

Article Number: 1817 | Rating: Unrated | Last Updated: Nov 27, 2012 at 8:39 PM

Question:

I want to rename a job in Planswift 9, how do I do this? Or, if I want to update a current job but keep the original so I save the changes as a revision how do I do this?

Answer:

Yes you can do both of these functions. For more information on how to do this please check out the articles under Job Management - http://www.planswift.com/phpkb/category.php?id=216

Posted Mike Ramsey - Jul 29, 2011 at 6:02 AM. This article has been viewed 2099 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1817

Remote Activation - I forgot to remove my license.

Article Number: 2287 | Rating: 4/5 from 1 votes | Last Updated: Sep 9, 2013 at 12:52 PM

Q: I am out of town with my laptop and need to work but can't activate it because my license is still active on my work computer. What Can I do?

A: You can log into '**My Account**' and request a temporary override on your license. This will give you a temporary 3 day activation so that you can continue to work. You can login to your account here.

Once you are logged in you can select the License tab, then select **Temporary Override** next to the appropriate license.

Posted Mike Ramsey - Sep 9, 2013 at 12:45 PM. This article has been viewed 1676 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2287

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why is it asking for activation again - why am i being asked to activate again.... i have a bid due and i cannot access....

Article Number: 1825 | Rating: Unrated | Last Updated: Aug 8, 2011 at 8:48 AM

Question:

Why am I being asked to activate again?

Answer:

PlanSwift will ask you to reactivate every 120 days. Simply press the activate button when you see this message. If you are still unable to activate at that time please make note of the message that is displayed as for the reason it will not activate. You can check the answers to the activation messages

here - http://www.planswift.com/kb/213/

Posted Mike Ramsey - Aug 8, 2011 at 2:14 AM. This article has been viewed 1294 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1825

Mac BootCamp - Will system 9 work through Mac Bootcamp?

Article Number: 2191 | Rating: Unrated | Last Updated: Nov 15, 2011 at 11:10 AM

Question:

Will version 9 work through Mac Bootcamp?

Answer:

Yes, PlanSwift Professional 9 will run on a Mac using Bootcamp and Windows.

Posted Mike Ramsey - Nov 15, 2011 at 3:19 AM. This article has been viewed 1079 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2191

How Do I make the zoom stay the same when I change pages ?

Article Number: 2257 | Rating: Unrated | Last Updated: May 24, 2012 at 8:59 PM

Question:

I want the zoom to stay the same when I change pages in blueprints. Life is too short to reset the zoom on every page.

Answer:

Go to Settings > General and select the option 'Automatic jump to the last view when opening a page'. This will remember the last view of each page during your current session.

Posted Mike Ramsey - May 4, 2012 at 12:57 AM. This article has been viewed 1076 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2257

SwiftMarket Desktop

What is SwiftMarket Desktop?

Article Number: 1798 | Rating: Unrated | Last Updated: Jul 19, 2011 at 3:20 PM

Basically it is an items list tool that allows you to create usages for items and assemblies - then takeoff in PlanSwift

It will connect to other data (lists of items) in the future versions

Check back soon for more information on this!

Posted Mike Ramsey - Jul 19, 2011 at 3:18 PM. This article has been viewed 1296 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1798

SwiftMarket Desktop Alpha Release Overview Video

Article Number: 1822 | Rating: Unrated | Last Updated: Aug 4, 2011 at 11:04 AM

http://www.planswift.com/swifttube/player/SwiftTubePlayer2.swf?VID=143&Play=false

To view full screen click on the 'Fullscreen' button on the video player

Posted Mike Ramsey - Aug 4, 2011 at 11:04 AM. This article has been viewed 1175 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1822

Trouble Shooting Planswift

There are no articles under this category.

Program Errors

PlanSwift was expecting to find the file {file\ location\ path} but it appears to be missing.

Article Number: 2267 | Rating: 2.1/5 from 15 votes | Last Updated: Oct 4, 2012 at 7:39 PM

As of PlanSwift version 9.3.9.16 a warning dialog was implemented to notify users of a potential issue that could cause problems if not corrected. This dialog reads as follows:

"PlanSwift was expecting to find the file *{the files location path}* but it seams to be missing. As a result, you may be missing information. Please check your results carefully."

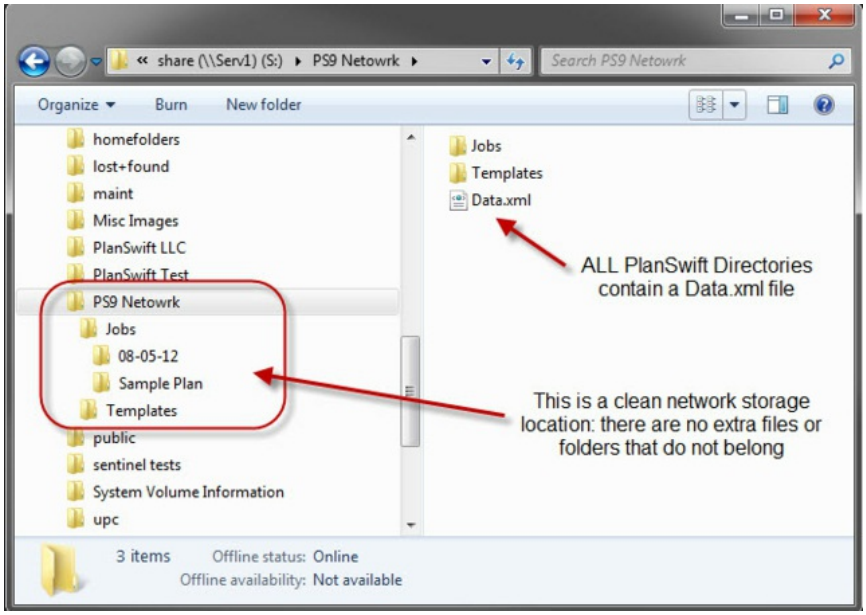
In 90% of all cases this affects users that have network storage locations. This is easily corrected in most cases. Here are the common causes for this.

1. Users have manually added additional directories into the PlanSwift storage location. PlanSwift storage locations are managed locations from within PlanSwift. These locations MUST remain clean, and should not be accessed from windows explorer to add files.
2. Power Failure: It is possible during a power failure or other Windows fault that the data.xml file may not have been written
3. Interrupted network connection the data.xml file may not have been written

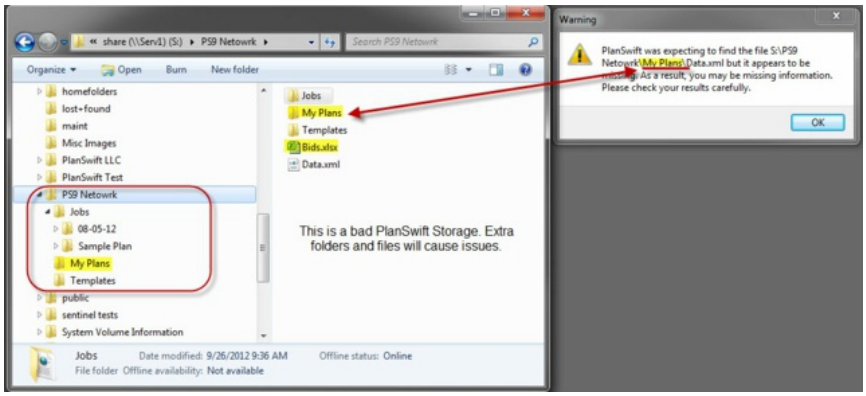
Most cases are where the user has added additional files or directories to the storage location manually. Simply moving those affected directories to an alternate location other than the PlanSwift Storage will correct the problem and cease to display the message. If you are experiencing this with a valid job file that is missing you can also move the specific job outside of the storage location. It is possible is some cases to rebuild the missing file. If you have a valid job directory that is missing the data.xml please contact technical support for assistance with fixing the problem.

Examples

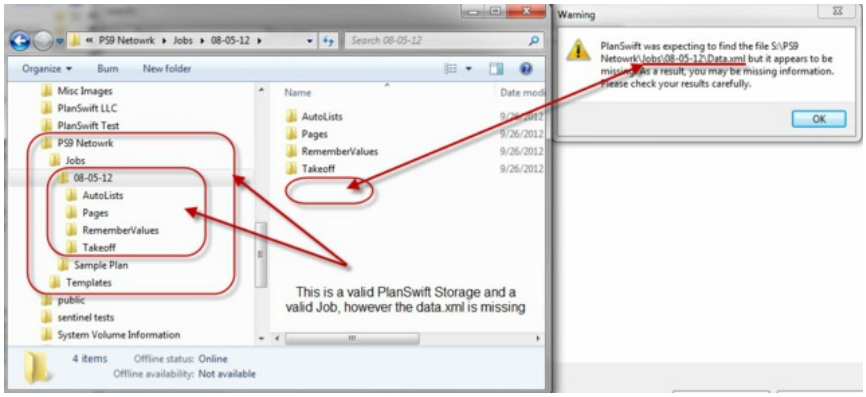
This is a Clean PlanSwift Storage. It only contains a Jobs and Templates directory with no additional files or folders added outside of PlanSwift.



This is a "dirty" storage. You can see it contains additional files and folders thus causing the warning to display. Simply removing this extra data will correct the issue.



This example shows a valid storage and valid job however as the warning indicates, there is the absence of the data.xml file in the job. At times this can be corrected Please contact Technical Support for help if you have this issue.



Posted Mike Ramsey - Oct 4, 2012 at 2:45 PM. This article has been viewed 75581 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2267

Error Drawing Overlay. Overlay Image May Be Too Large.

Article Number: 1827 | Rating: 3.5/5 from 2 votes | Last Updated: Aug 11, 2011 at 1:48 PM

This error is usually caused when there is not enough memory to preform the action. Certain images, depending on the bit depth, can render the image too large as the image has to be re-rendered to a higher bit depth to allow for the transparency layer. One thing that you can try to do in some cases is re-import the drawings at a lower dpi setting like150 with color set to "Black and white".

Posted Mike Ramsey - Aug 11, 2011 at 1:48 PM. This article has been viewed 1220 times.

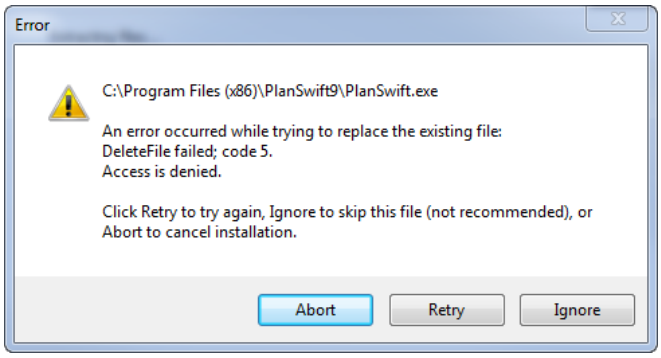
Online URL: http://www.planswift.com/phpkb/article.php?id=1827

Common Installation / Update Issues

DeleteFile Failed; code 5. Access is denied.

Article Number: 1793 | Rating: Unrated | Last Updated: Jul 7, 2011 at 9:08 AM

This error indicates that there is still an active PlanSwift process running and the installer cannot replace the existing file because it is in use. The most common scenario would be that the PlanSwift program did not close during an update. If you see PlanSwift on the application bar at the bottom of your screen simply right click on it and select Close. Next press Retry on the error message box. If the error persists, restart your computer then run PlanSwift and the update before running any other applications.


Error
C:\Program Files (x86)\PlanSwift9\PlanSwift.exe
An error occurred while trying to replace the existing file:
DeleteFile failed; code 5.
Access is denied.
Click Retry to try again, Ignore to skip this file (not recommended), or
Abort to cancel installation.
Abort
Retry
Ignore

Posted Mike Ramsey - Jul 7, 2011 at 9:08 AM. This article has been viewed 1778 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1793

Common Activation Issues

Error Connecting. Please Make sure you have an internet connection and try again.

Article Number: 1788 | Rating: 2/5 from 1 votes | Last Updated: Jul 5, 2011 at 11:53 AM

If you received this message you may not be connected to the internet. If you are connected to the internet then the issue is likely due to a firewall that is blocking PlanSwift from gaining access to the internet. Be sure to add a firewall exception to your security program for PlanSwift. For information on setting this up in Windows See this help article - Allow a program to communicate through Windows Firewall

Warning
Error connecting. Please make sure you have an internet connection and try again.
Would you like to obtain an unlock code through your default web browser?
Yes
No

If you do not have access to these settings you can select yes to obtain a code through the default web browser and manually activate PlanSwift. You can also obtain a manual activation by calling our automated activation line at 1-888-752-6794 option 9.

Posted Mike Ramsey - Jul 1, 2011 at 4:42 PM. This article has been viewed 1383 times.

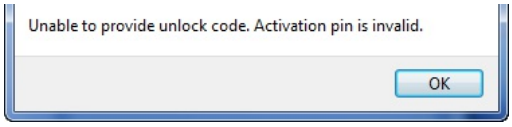
Online URL: http://www.planswift.com/phpkb/article.php?id=1788

Unable to provide unlock code. Activation pin is invalid.

Article Number: 1791 | Rating: Unrated | Last Updated: Jul 6, 2011 at 3:21 PM

You may receive this error if the PIN number you entered is incorrect. Please re-enter your

5 digit pin number and press Activate. If you do not know your pin number click here to have your activation codes resent to you.



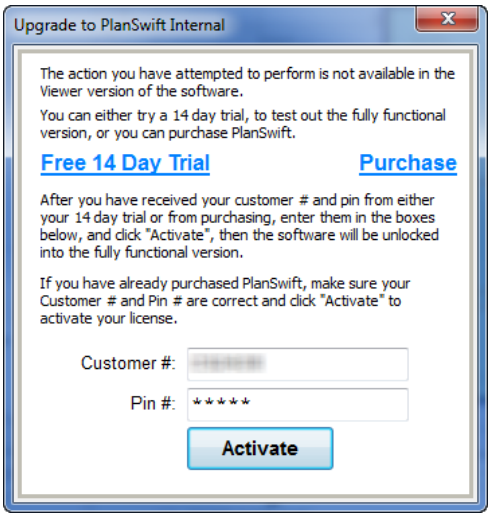
Posted Mike Ramsey - Jul 6, 2011 at 3:05 PM. This article has been viewed 995 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1791

The action you attempted to perform is not available in the viewer version of the software.

Article Number: 1790 | Rating: Unrated | Last Updated: Jul 5, 2011 at 11:50 AM

You have received this message because your trial has expired or the activation code on your computer has reached its expiration date. If you have a purchased version of PlanSwift simply press the activate button again to re-validate the computer activation. This typically occurs approximately every 4 months.


Upgrade to PlanSwift Internal
The action you have attempted to perform is not available in the Viewer version of the software.
You can either try a 14 day trial, to test out the fully functional version, or you can purchase PlanSwift.
Free 14 Day Trial
Purchase
After you have received your customer # and pin from either your 14 day trial or from purchasing, enter them in the boxes below, and click "Activate", then the software will be unlocked into the fully functional version.
If you have already purchased PlanSwift, make sure your Customer # and Pin # are correct and click "Activate" to activate your license.
Customer #:
Pin #:
*****
Activate

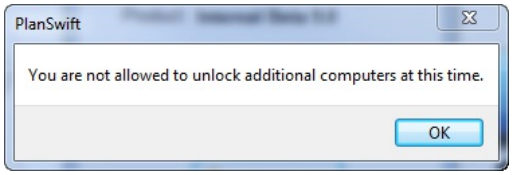
Posted Mike Ramsey - Jul 5, 2011 at 11:50 AM. This article has been viewed 780 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1790

You are not allowed to unlock additional computers at this time.

Article Number: 1787 | Rating: Unrated | Last Updated: Jul 5, 2011 at 11:54 AM

You have received this message because you have exceeded the number of activations on your PlanSwift License. Please remove one or more of the activations from one of the activated computers by going to the active computer and going to the help tab in PlanSwift and selecting 'Software License Options' then click 'Remove license'.



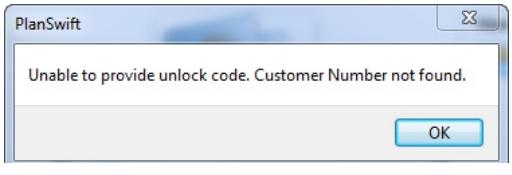
Posted Mike Ramsey - Jul 1, 2011 at 4:00 PM. This article has been viewed 776 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1787

Unable to provide unlock code. Customer Number not found.

Article Number: 1792 | Rating: Unrated | Last Updated: Aug 11, 2011 at 4:15 PM

You may receive this message if you entered the wrong customer number. The customer number must be entered using the letter C as the first character. If you do not know your customer number click here to have your activation codes resent to you.



Posted Mike Ramsey - Jul 6, 2011 at 3:13 PM. This article has been viewed 694 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1792

License has expired.

Article Number: 1789 | Rating: Unrated | Last Updated: Jul 5, 2011 at 11:43 AM

You may receive this message if your PlanSwift account license has expired. This can happen if you have a subscription to PlanSwift or are on a payment plan if a payment was declined or otherwise canceled. If you feel that it was received in error please contact the billing department at 1-888-752-6794 option 3.

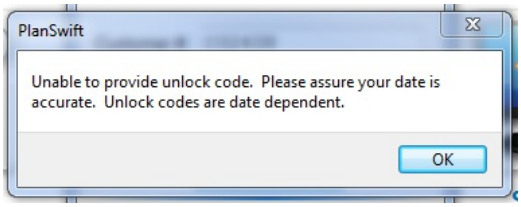
Posted Mike Ramsey - Jul 5, 2011 at 11:42 AM. This article has been viewed 481 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1789

Unable to provide unlock code. Please assure your date is accurate. Unlock codes are date dependent

Article Number: 1786 | Rating: Unrated | Last Updated: Jul 1, 2011 at 4:59 PM

This message is common but is easily resolved by checking the date and time on your computer. Right click on the clock in your system tray and select Adjust Date/Time from the right click menu. Simply set the correct date and time in windows and apply the settings. Now retry the activation in PlanSwift.



Posted Mike Ramsey - Jul 1, 2011 at 3:42 PM. This article has been viewed 416 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1786

Scripts and Plugins

There are no articles under this category.

Third Party Plugins

Concrete for Budget Takeoff

Article Number: 2226 | Rating: Unrated | Last Updated: Dec 28, 2011 at 9:10 AM

Concrete for Budget Takeoff

Concrete for Budget Takeoff plugin is a quick and easy database intended for swift takeoff of concrete without a lot of detail. This database covers all the major type of concrete and is intended to all for takeoff to gather the SF of forming, CY of concrete and the SF of finish.

To Install

Open PlanSwift.
Go to the "Setting" Tab
Click on the "Import Plugin Package"
Follow the directions provided by Planswift.
After installation you will find "Budget Concrete" in the "Templates" Tab ready for your use.

To Delete

Go to the "Templates" Tab
Right click on the "Budget Concrete" Tab
Click on "Delete Tab"

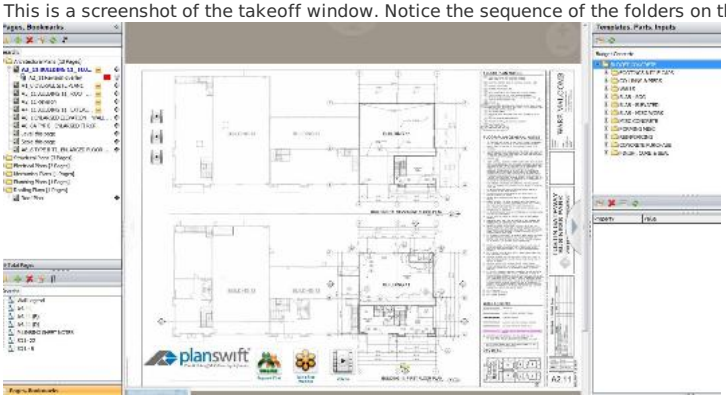
Plugin Sections

The database is sequenced into :

- Footings & Pile Caps
- Columns & Piers
- Walls
- Slab - SOG
- Slab - Elevated
- Slab - Misc Work
- Misc Concrete
- Reinforcing
- Concrete Purchase
- Finish, Cure & Seal

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the folders on the right side.



Footings & Pile Caps

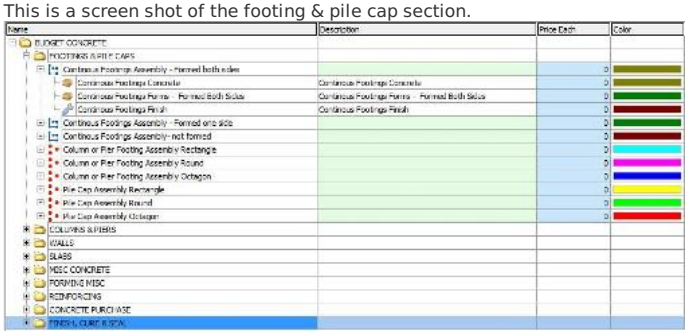
The footings & pile cap section provides takeoff of concrete, forms and finish for the following conditions:
Continuous Footings Assembly - Formed both sides
Continuous Footings Assembly - Formed one side
Continuous Footings Assembly - not formed
Column or Pier Footing Assembly Rectangle
Column or Pier Footing Assembly Round
Column or Pier Footing Assembly Octagon
Pile Cap Assembly Rectangle
Pile Cap Assembly Round
Pile Cap Assembly Octagon

The assemblies for round shape will use the diameter for both the forming and volume calculations.

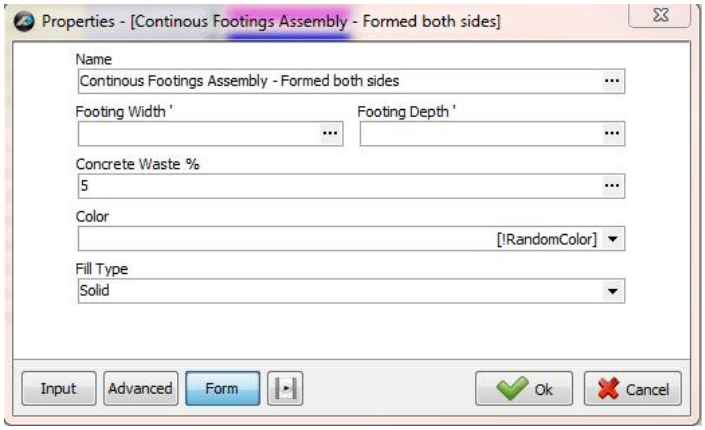
The assemblies for octagon will use the lineal foot of one side of the octagon for the forming and volume calculations.

Each assembly has a part for the takeoff of the concrete, the forming, and the finish.

This is a screen shot of the footing & pile cap section.



The takeoff properties for each assembly in this section is as follows:



The user will input the dimension information based on the geometry of the condition and revise the waste if desired.

Columns & Piers

The columns & Piers section provides takeoff of concrete, forms and finish for the following conditions:
Columns - Rectangle
Columns - Round
Columns - Octagon
Piers - Rectangle
Piers - Round
Piers - Octagon
Sonotube Concrete

The assemblies for round shape will use the diameter for both the forming and volume calculations.

The assemblies for octagon will use the lineal foot of one side of the octagon for the forming and volume calculations.

The assembly for sonotube allows for sonotube of 8 inches to 42 inches in all standard diameters for sonotube.

Each assembly has a part for the takeoff of the concrete, the forming, and the finish.

This is a screen shot of the Columns & Piers section.

Walls

The Walls section provides takeoff of concrete, forms, bulkhead form, and finish for the following conditions:
Wall Concrete
Grade Beam
Stem Wall
Pilasters @ Concrete Wall
Wall Brickshelf
Wall Boxout by Count
Sonotube Concrete

The assembly for walls and grade beam allows for the takeoff of:
- Wall Concrete
- Wall Form
- Wall Bulkhead Form
- Wall Column Beam Pockets
- Wall Top Finish

The assembly for stem wall allows for the takeoff of:
- Wall Concrete
- Wall Form
- Wall Top Finish

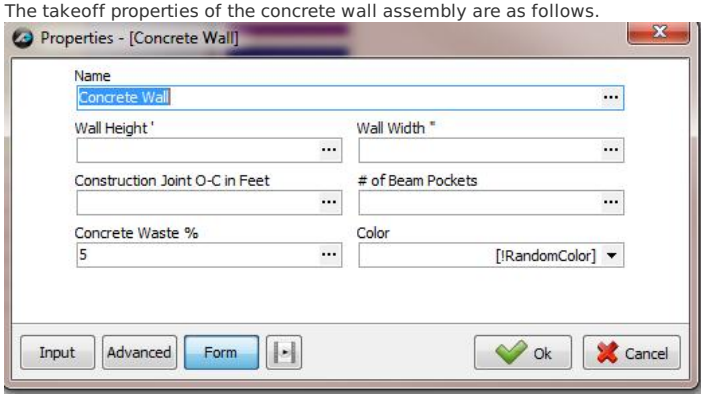
The assembly for pilasters allows for the takeoff of:
- Wall Concrete
- Pilaster Wall Form
- Pilaster Top Finish

The assembly for wall Brickshelf allows for the takeoff of:

Brickshelf concrete Deduct
Brickshelf Form

The Wall Boxout assemblies allow for the takeoff of:
Wall Boxout Concrete Deduct
Wall Boxout Form

The takeoff properties of the concrete wall assembly are as follows.



Slab - SOG

The SOG section provides a series of assemblies for taking off different types and conditions of typical slab on grade conditions. The takeoff assemblies are as follows:
Mud Slab
Column Diamonds
SOG Exterior - Edge Formed all Sides
SOG Interior - No Edge Form
SOG Construction Joint Form
SOG Thickened Edge
SOG Thickened Slab by LF
SOG Thickened Slab by Area
SOG Boxout

The assembly for **Mud Slab** allows for the concrete - form - finish takeoff of a mud slab in the construction work zone.

The assembly for **Column Diamonds** is specific to takeoff the column diamonds of an interior SOG. This is a count assembly where you count the column diamonds then in the properties set the length and width of the diamond

The assembly for **SOG Exterior - Edge Formed all Sides** is for exterior SOG in which the entire slab is formed

The assembly for **SOG Interior - No Edge Form** is for interior SOG in which the slab is poured up against a wall and therefore an expansion joint is required in lieu of the edge form.

The assembly for **SOG Construction Joint Form** is specifically to take off the bulkhead construction joint form of larger SOG when you have to pour the larger slab in pours by bays.

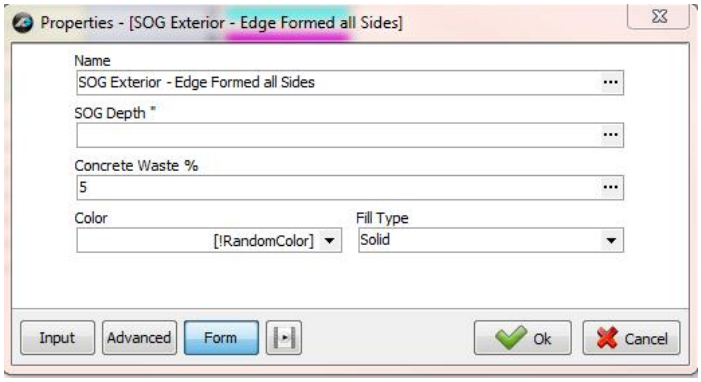
The assembly **SOG Thickened Edge** is specific for the thickened edge portion only of a SOG. This assembly only brings in the additional formwork and required for the thickened edge. The thickened edge is assumed to be monolithic with the slab. The interior side is assumed to slope at a 45 degree angle up to the nominal SOG. This is concrete only as there is no forming for this condition.

The assembly **SOG Thickened Slab by LF** is for a thickened section of the slab in the interior of the SOG that is take off by lineal feet. For example along a bearing wall line where the SOG is thicker for structural reasons. The slope on both sides is assumed to be at a 45 degree angle. This is concrete only as there is no forming for this condition.

The assembly **SOG Thickened Slab by Area** is for a thickened section of the slab in the interior of the SOG that is take off by area SF. For example at a chimney area where extra support is required. The calculation is a straight area times depth for the concrete. Since the slope on the edge is not taken into account the waste is changed to 10 %. Increase the waste if you desire. This is concrete only as there is no forming for this condition.

The assembly for the **SOB Boxout** is specific to the Boxout of a slab. This assembly will give you the items for the deduct of the concrete in the SOG and the add for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

For each of the above assemblies in the properties window you will be asked in the questions pertaining to that condition. For example here is the properties for the SOG Exterior - Edge Formed all Sides.



Slab - Elevated

The elevated slab section provides a series of assemblies for taking off different types and conditions of typical elevated slabs. This includes both slab on metal deck, structural slabs, and pan or dome slabs. The takeoff assemblies are as follows:
Slab on Metal Deck
Slab on Metal Deck Construction Joint
Slab on Metal Deck Boxout
Structural Slab
Pan Slab
Structural or Pan Slab Boxout
Structural or Pan Slab Construction Joint

The assembly for **Slab on Metal Deck** is for a slab on metal deck and the exterior edge form. This assembly will use the average depth of the metal deck concrete. This takes into account the concrete in the flukes of the metal deck. The average depth should be provided by the deck supplier.

The assembly for **Slab on Metal Deck Construction Joint Form** is specifically to take off the bulkhead construction joint form of larger slab when you have to pour the larger slab in pours by bays.

The assembly for the **Slab on Metal Deck Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the ad for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for the **Structural Slab** is specific to a self supporting structural slab that is bottom formed and supported with shoring till the concrete is cured. Additional lines for the bottom form and the shoring are added. The shoring is calculated in cubic feet , therefore the properties will ask for the height above the finish floor of the structural slab.

The assembly for the **Pan Slab** is specific to a self supporting pan filled structural slab that is bottom formed and supported with shoring till the concrete is cured. Additional lines for the bottom form and the shoring are added. The shoring is calculated in cubic feet , therefore the properties will ask for the height above the finish floor of the structural slab.

The assembly for the Structural or **Pan Slab Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the add for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for the **Structural or Pan Slab Construction Joint** is specifically to take off the bulkhead construction joint form of larger slab when you have to pour the larger slab in pours by bays.

Slab - Misc Work

The Miscellaneous Work slab section provides a series of assemblies for taking off different types of slabs.
Topping Slab
Topping Slab Construction Joint
Topping Slab Boxout
Equipment Pad

The assembly for **Topping Slab** is for a the topping slab that is poured for the finish surface on a slab. In this case the topping slab is not designated as being on grade or elevated, but as a topping slab. The assembly brings in the concrete, forms, and finish of the topping slab.

The assembly for **Topping Slab Construction Joint** is specifically to take off the bulkhead construction joint form of the topping slab when you have to pour the larger slab in pours by bays.

The assembly for the **Topping Slab Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the ad for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for **Equipment Pad** is used to takeoff the misc equipment pads that you will have for equipment settings.

Misc Concrete

The Miscellaneous Concrete section provides a place for sidewalk and metal pan stair assemblies. The assemblies in this section are as follows:

Sidewalk by LF
Sidewalk by Area
Metal Pan Landings
Metal Pan Risers

The assembly **Sidewalk by LF** is intended to for sidewalks where the user would like to takeoff the sidewalk by the lineal foot. Takeoff the sidewalk by the lineal feet of the centerline of the walk. This assembly will take off the forming, concrete, finish and the liquid curing white pigment finish used on sidewalks. The sidewalk concrete depth is set to 4" and the width is set to 4'. These are the normal dimensions for sidewalks but can be changed by the user if desired.

The assembly **Sidewalk by Area** is intended to for sidewalks where the user would like to takeoff the sidewalk by the area square foot. This assembly will take off the forming, concrete, finish and the liquid curing white pigment finish used on sidewalks. The sidewalk concrete depth is set to 4" as this is the normal depth of sidewalks, but can be changed by the user is need be. The edge form calculation will use the external lineal feet of area.

The assembly **Metal Pan Landings** is intended for takeoff of the metal pan landings of a stairwell. Count the landings with the takeoff and input at the properties tab for the input of the lending length, width, and the depth of the concrete.

The assembly **Metal Pan Risers** is intended for takeoff of the metal pan riser of a stairwell. Count the risers with the takeoff and input at the properties tab for the input of the riser, width, and the depth of the concrete.

Forming Misc

The Forming Misc section provides a place for other forming issues that the user may wish to takeoff. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. This section is broken down as follows:

- Keyway & Chamfer
- Vapor Barriers
- Anchor Bolts & Templates
- Rigid Insulation
- Set Steel in Concrete
- Crack Control

The section for **Keyway & Chamfer** holds the items for keyway for 2x4, 2x6, and upset keyway. Also Edge chamfer item is here.

The section for **Vapor Barriers** contains the vapor barriers in 4 mill, 6 mill and for moistop.

The section for **Anchor Bolts & Templates** contains anchor bolts from 1/2" up to 2" in all nominal sizes. Also included are anchor bolt templates for 2-4-6-and 8 anchor bolt sets.

The section for **Rigid Insulation** contains rigid insulating for both under slab and foundation insulation form 1" to 3" in all nominal sizes in between.

The section for **Set Steel in Concrete** contains numerous types of embedded steel shapes and conditions.

The section for **Crack Control** contains conditions for saw cut of slab, zip strips and hand tool of joints.

Reinforcing

The Reinforcing section provides a place for reinforcing issues that the user other forming issues that the user may wish to takeoff. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. This section is broken down as follows:

- Rebar
- Rebar CAD Weld Connections
- Rebar Threaded Connectors
- Rebar Dowels
- Welded Wire Mesh

This section will be greatly upgraded in the next release of this database.

The **Rebar** section provides conditions for all nominal rebar sizes from #3 to # 14.

The **Rebar CAD Weld Connections** section provides conditions for all rebar CAD weld connections in al nominal rebar sizes from #3 to # 14.

The **Rebar Threaded Connectors** section provides conditions for all rebar threaded connections in all nominal rebar sizes from #3 to # 14.

The **Rebar Dowel** section provides conditions for all rebar dowels in all nominal rebar sizes from #3 to # 8

The **Welded Wire Mesh** section provides area SF conditions for every wire mesh size available.

Finish, Cure & Seal

The Finish, Cure & Seal section provides a place for finishing activities to placed concrete. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. The section is broken down as follows:

Finish Flatwork
Other Finish
Concrete Rubbing & Grind
Curing
Seal & Hardener

The **Finish Flatwork** Section is the placeholder for specific finish options, color, and shake on products.

The **Other Finish** Section is a place for top of wall and stair finish.

The **Concrete Rubbing & Grind** Section is the p[lace for grind, sandblast, rubbing, and bush hammer of the concrete finish.

The **Curing** Section provides other options for curing.

The **Seal & Harder** section provides for specific types of sealers and hardeners

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Upgrades

The Budget Concrete Template will receive an upgrade in the spring and fall of 2012. As a purchaser of the template you can receive this upgrade at no cost.

If you own the database I will put your suggestions into the upgrades. Just email the developer at planswift@database-solutions.com

Support

The developer of this PlanSwift library has worked in the construction software database industry for 15 years and works daily with estimators of all types.

David Ayers
Database Solutions
planswift@database-solutions.com

Posted Mike Ramsey - Dec 28, 2011 at 9:09 AM. This article has been viewed 3405 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2226

Accurate Landscape Plugin

Article Number: 1809 | Rating: Unrated | Last Updated: Aug 25, 2011 at 1:50 PM

Accurate Landscape Plugin allows the end user the ability to enter costs into the Input window, the estimating report window, or on the actual template itself. It covers Landscape Estimating and basic Hardscapes. The Landscaping section had an extensive Data base built into the Description window. So when the user opens the tree or shrub count property box for estimating they can select a botanical name without having to spell it out completely. The irrigation Template also has a data base of sprinklers, valves and pipe.

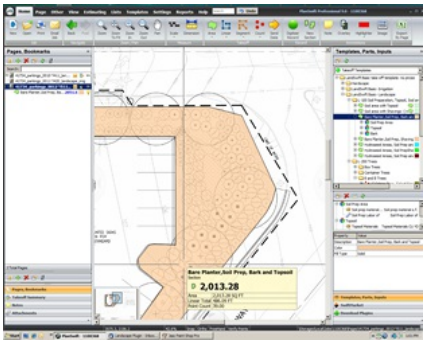
The reports are driven by cost codes , divisions and Phases.

- Divisions Irrigation, Landscape and Hardscape.
- Phases L-100 to L-800 for Landscaping
- Cost Codes are broken down for Labor and Materials

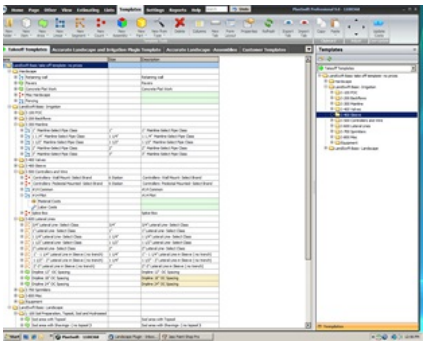
This will allow for the end user to break out Labor by cost codes to allow for budgeting and timecard inputs.

Watch Videos

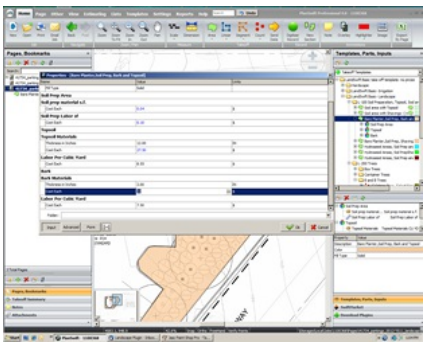
Take Off Screenshot :
This is a Screenshot of the take off window, these folders are broken down into Landscape, Hardscape and Irrigation



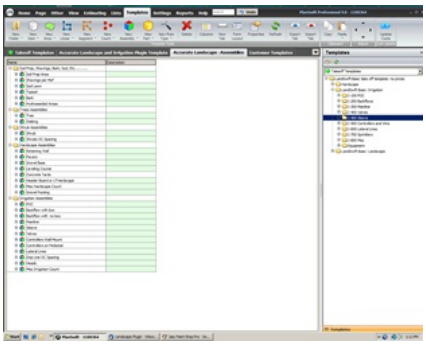
Takeoff Template Screenshot:
This is the basic template the end user can pull his estimates from. They of course can enter standard rates here on each item or adjust the labor codes. As you can see I have use the assemblies in each section. The L-100 type codes are my coding for each phase of the Landscape job. These are in order of Construction. I have provided the shrubs On Center spacing for either, a drop and drag take off, or as a separate Item. I have also provided several different soil prep items to allow the user the option of creating their own soil prep or using one the provided ones. You can see the assemblies tab (separate Screen shot) as well as a place to store the backup Templates for the Landscape Package.



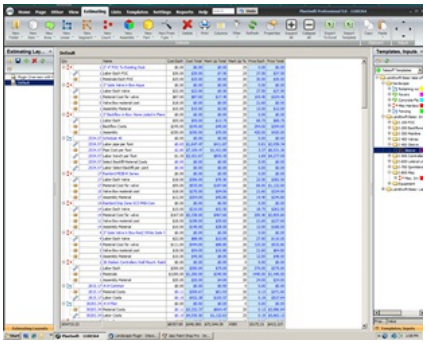
Input Screenshot:
This a screenshot of the input window, where the user can enter costs or data. Example â€¦ For Mainline pipe there is a box for; description (database), Pipe size (database), Pipe Costs, Pipe Labor per feet (not including trenching), Trenching and backfill costs (labor), Selected backfill description, Backfill costs, Trench depth, and width, and Labor per yard to place Gravel. These can also be set up in the template window as well as the estimating screen.



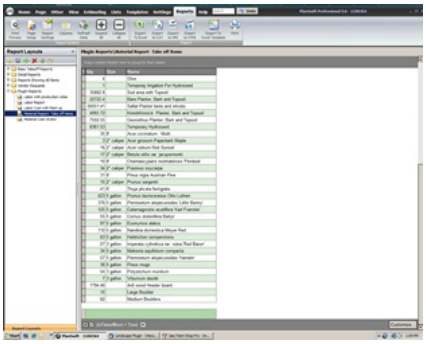
Assemblies Screenshot:
These are all of the assemblies provided with the Plugin. They are broken down into several different catagories.



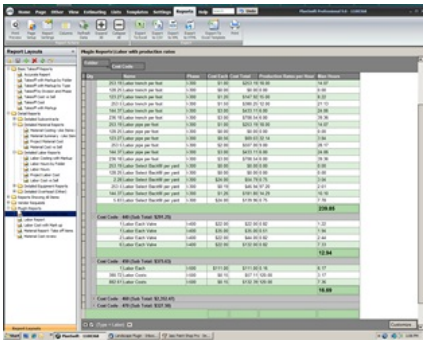
Estimate Report Expanded view Screenshot:
Basic report for the user along with totals as well as a place to input costs.



Materials Quote Report Screenshot:
Broken down by Division and take off items.



Labor report with man days and production rates:
The user can adjust the hour rates in the columns window. These breakdowns can be used for job tracking and budgeting per phase. There also a couple of other labor and material costs report totals as well.



PlanSwift- Accurate Landscape-plugin tutorial- Soil Prep

PlanSwift - Accurate Landscape Plugin - Sleeves, Main and Laterals

PlanSwift Accurate Landscape Plugin tutorial- Pricing

PlanSwift- Accurate Landscape Plugin- Tree tutorial

PlanSwift - Accurate Landscape Plugin- Cost codes and reports explained

Support Contact Information:

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Phone: **541-646-0975**

Posted Mike Ramsey - Jul 28, 2011 at 9:32 AM. This article has been viewed 3251 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1809

Painting

Article Number: 2255 | Rating: Unrated | Last Updated: Jun 22, 2012 at 12:46 PM

Painting

Painting for plugin is a quick and easy database intended for swift takeoff of Painting on a budget basis. This database covers all the major type of takeoff issues that a Painting contractor will encounter.

Video Demo

Watch the video demo of the Painting Plugin.

Plugin Sections

The database is sequenced into :

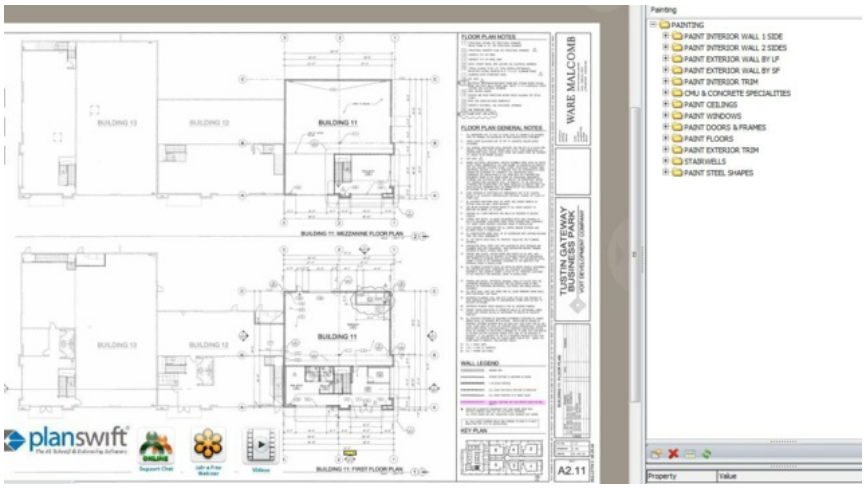
- Paint Interior Wall 1 Side
- Paint Interior Wall 2 Sides
- Paint Interior Trim
- Paint Exterior Wall by LF
- Paint Exterior Wall by SF
- Paint Exterior Trim
- CMU & Concrete Specialties

Paint Ceilings
Paint Windows
Paint Doors & Frames
Paint Floors
Paint Stairwells
Paint Steel Shapes

****** Note, that the order of these conditions are set correctly as we have set up the data. The Planswift program will move these conditions around as you use the Plugin. This is a known issue and the fix is under way with a future Planswift upgrade.***

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the folders on the right side.



Each folder is discussed in detail below.

Paint Wall on 1 Side

This section is to be used when you are painting a wall on one side only. There are child folders for different paint substrates such as:

Paint Wall on 1 Side GWB
Paint Wall on 1 Side CMU
Paint Wall on 1 Side Concrete
Paint Wall on 1 Side Plaster
Paint Wall on 1 Side Wood
Stain Wall on 1 Side Wood

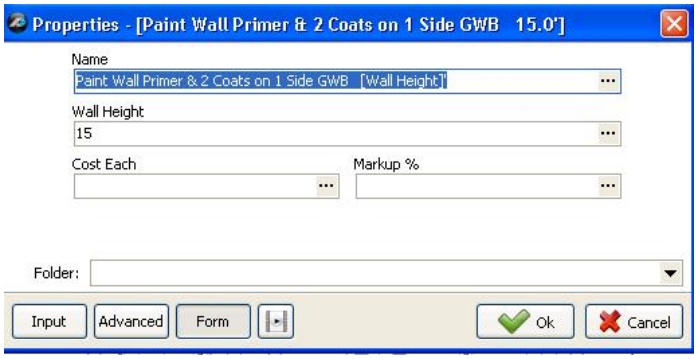
Each sub section in turn is organized as follows. For this example we are using the GWB as an example:

Paint Wall on 1 Side GWB
- Paint Wall Primer & 2 Coats on 1 Side GWB 8'
- Paint Wall Primer & 2 Coats on 1 Side GWB 9'
- Paint Wall Primer & 2 Coats on 1 Side GWB 10'
- Paint Wall Primer & 2 Coats on 1 Side GWB 11'
- Paint Wall Primer & 2 Coats on 1 Side GWB 12'
- Input other height
  - Paint Wall Primer & 2 Coats on 1 Side GWB 15'

*** Note, that the order of these conditions are set correctly as we have set up the data. The Planswift program will move these conditions around as you use the Plugin. This is a known issue and the fix is under way with a future Planswift upgrade.

The first 5 conditions are pre-set so that you do not have to input the height of the wall. These heights are set up and the math is completed to calculate the SF of the 1 sided wall that you are to paint. As an example, if you have a 9 foot wall to takeoff select this condition, takeoff the length of the wall and this length is calculated times the height of 9 foot for you. This method will cover 85% of what the average use will encounter.

For the times you have a wall of a different height click on the "Input other Height" folder and then the conditions inside this folder. As you use this condition the 1st question you will see will be the height of the wall. This is pre-set to 15 feet. Change to reflect the actual wall height you want to see. A screen shot of this condition is as follows.



When you input the wall height the description will change to reflect the wall height of the takeoff.

Paint Wall on 2 Sides

This section is to be used when you are painting a wall on 2 sides. There are child folders for different paint substrates such as:

- Paint Wall on 2 Sides GWB
- Paint Wall on 2 Sides CMU
- Paint Wall on 2 Sides Concrete
- Paint Wall on 2 Sides Plaster
- Paint Wall on 2 Sides Wood
- Stain Wall on 2 Sides Wood

Each sub section in turn is organized as follows. For this example we are using the GWB as an example:

- Paint Wall on 1 Side GWB
  - Paint Wall Primer & 2 Coats on 2 Sides GWB 8'
  - Paint Wall Primer & 2 Coats on 2 Sides GWB 9'
  - Paint Wall Primer & 2 Coats on 2 Sides GWB 10'
  - Paint Wall Primer & 2 Coats on 2 Sides GWB 11'
  - Paint Wall Primer & 2 Coats on 2 Sides GWB 12'
  - Input other height
    - Paint Wall Primer & 2 Coats on 2 Sides GWB 15'

*** Note, that the order of these conditions are set correctly as we have set up the data. The Planswift program will move these conditions around as you use the Plugin. This is a known issue and the fix is under way with a future Planswift upgrade.

The first 5 conditions are pre-set so that you do not have to input the height of the wall. These heights are set up and the math is completed to calculate the SF of the 2 sided wall that you are to paint. As an example if you have a 9 foot wall to takeoff select this condition. Takeoff the length of the wall and this length is calculated times the height of 9 foot for you time both sides of the wall. This method will cover 85% of what the average use will encounter.

For the times you have a wall of a different height click on the "Input other Height" folder and then the conditions inside this folder. As you use this condition the 1st question you will see will be the height of the wall. This is pre-set to 15 feet. Change to reflect the actual wall height you want to see.

Paint Interior Trim

This section is to be used when you are painting trim. There are child folders for different paint substrates such as:

- Paint Interior Trim
- Stain Interior Trim

Each sub section in turn is organized as follows. For this example we are using the Paint Interior Trim as an example:

- Paint Interior Trim
  - Paint Primer & 2 Coats @ Crown Molding
  - Paint Primer & 2 Coats @ Picture Rail
  - Paint Primer & 2 Coats @ Cornice Molding
  - Paint Primer & 2 Coats @ Chair Rail
  - Paint Primer & 2 Coats @ Map Rail
  - Paint Primer & 2 Coats @ Wall Cap
  - Paint Primer & 2 Coats @ Baseboard

*** Note, that the order of these conditions are set correctly as we have set up the data. The Planswift program will move these conditions around as you use the Plugin. This is a known issue and the fix is under way with a future Planswift upgrade.

Click on the green button for the condition that you want. Input the width of the trim. For a starting point all trim is assumed to be 1 foot wide. Then takeoff the length of the trim.
The Stain Interior Trim works exactly as the paint.

Paint Exterior Wall by LF

This section is to be used when you are painting an exterior wall and taking off the wall by lineal feet. All exterior wall in this section is assumed to be a one sided wall. There are child folders for

different paint substrates such as:

- Paint Exterior Wall CMU
- Paint Exterior Wall Concrete Wall
- Paint Exterior Wall EIFS Wall
- Paint Exterior Wall Metal Siding
- Paint Exterior Wall Clapboards
- Paint Exterior Wall Shingles
- Stain Exterior Wall Clapboards
- Stain Exterior Wall Shingles

Each sub section in turn is organized as follows. For this example we are using the CMU as an example:

- Paint Exterior Wall CMU
  - Paint Exterior CMU Block Filler & 2 Coats 1 Side 8'
  - Paint Exterior CMU Block Filler & 2 Coats 1 Side 9'
  - Paint Exterior CMU Block Filler & 2 Coats 1 Side 10'
  - Paint Exterior CMU Block Filler & 2 Coats 1 Side 11'
  - Paint Exterior CMU Block Filler & 2 Coats 1 Side 12'
  - Input other height
    - Paint Exterior CMU Block Filler & 2 Coats 1 Side 15'

*** Note, that the order of these conditions are set correctly as we have set up the data. The Planswift program will move these conditions around as you use the Plugin. This is a known issue and the fix is under way with a future Planswift upgrade.

The first 5 conditions are pre-set so that you do not have to input the height of the wall. These heights are set up and the math is completed to calculate the SF of the wall that you are to paint. As an example if you have a 9 foot wall to takeoff select this condition, takeoff the length of the wall and this length is calculated times the height of 9 foot for you. This method will cover 85% of what the average use will encounter.

For the times you have a wall of a different height click on the "Input other Height" folder and then the conditions inside this folder. As you use this condition the 1st question you will see will be the height of the wall. This is pre-set to 15 feet. Change to reflect the actual wall height you want to see

When you input the wall height the description will change to reflect the wall height of the takeoff.

Paint Exterior Wall by SF

This section is to be used when you are painting an exterior wall and taking off the wall with the elevation view by square feet. This section contains all the direct conditions. There are no child folders to this section.

- Paint Exterior Wall CMU Wall Block Filler & 2 Coats
- Paint Exterior Wall Concrete Wall Block Filler & 2 Coats
- Paint Exterior Wall EIFS Wall Primer & 2 Coats
- Paint Exterior Wall Metal Siding Primer & 2 Cots
- Paint Exterior Wall Clapboards Primer & 2 Coats
- Paint Exterior Wall Shingles Primer & 2 Coats
- Stain Exterior Wall Clapboards Sealer & 2 Coats
- Stain Exterior Wall Shingles Sealer & 2 Coats

Pick the condition you wish to use, by clicking on the green button, then takeoff the area in SF of the area to be painted.

Use the Boxout function of Planswift to deduct exterior openings from the base area.

CMU & Concrete Specialties

This is a small section to be used for specialty conditions with CMU or Concrete walls. This section contains the following types of coatings.

- CMU-Concrete Stain Cover
- CMU-Concrete Block Filler
- CMU-Concrete Elastomeric Hydro Coating
- CMU-Concrete Clear Hydro Sealer

Pick the condition you wish to use, by clicking on the green button, then takeoff the area in SF of the area to be painted.

Paint Windows

This is a section to be used for the painting of windows. Windows come in a variety of sizes, materials, types, and manufactures. All of this is ignored in this section, and we are using the Window ID for each type of Window as identified by the Architect or Engineer.

Choose the window ID by number, in the properties box you can change the description to match the specifications of the window. Once this is done, then count each of this type of window.

In this section you have a choice for a window that is painted and also for a wood window that is stained.

Paint Doors & Frames

This is a small section to be used for the painting of doors. Doors are broken apart by single or double doors, the transoms and sidelights, then for specialty doors. Doors and frames are further broken apart by being hollow metal or wood. The door size is not a consideration as this makes little difference in the

amount of paint, or the man hour per door leaf. The sections are as follows.

- Paint Single Doors
- Paint Double Doors
- Transoms - Sidelights - Borrow Light
- Specialty Doors

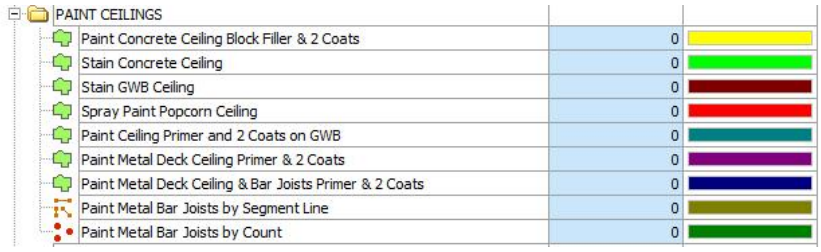
In turn, each section is further broken down into conditions for each section. For example at Paint Single Door you have the following door types to paint.

- Paint Single HM Frame & HM Door
- Paint Single HM Frame & Wood Door
- Paint Single Wood Frame & Wood Door
- Stain Single Wood Frame & Wood Door

Then in turn each of the above conditions will have separate conditions for the door and frame. This way you can adjust the cost of each as desired. At double doors the math is set up to provide the painting for 1 double frame and 2 door leafs.

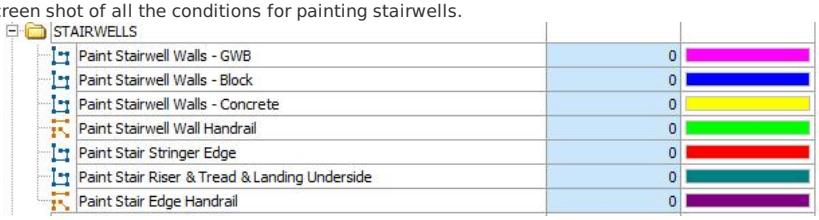
Paint Ceilings

This is a section to be used for the painting of ceilings. There are no child folders in this section, as it directly contains all the conditions for the ceiling painting. Here is a screen shot of all the conditions for painting ceilings.


PAINT CEILINGS
Paint Concrete Ceiling Block Filler & 2 Coats 0
Stain Concrete Ceiling 0
Stain GWB Ceiling 0
Spray Paint Popcorn Ceiling 0
Paint Ceiling Primer and 2 Coats on GWB 0
Paint Metal Deck Ceiling Primer & 2 Coats 0
Paint Metal Deck Ceiling & Bar Joists Primer & 2 Coats 0
Paint Metal Bar Joists by Segment Line 0
Paint Metal Bar Joists by Count 0

Paint Stairwells

This is a section to be used for the painting of stairwells. This section is broken down into the components of the stairwell starting from the inside of the exterior walls, and then of the stairwell parts. Each type of conditions has the takeoff method for the type of takeoff needed. There are no child folders in this section, as it directly contains all the conditions for the stairwell painting. Here is a screen shot of all the conditions for painting stairwells.


STAIRWELLS
Paint Stairwell Walls - GWB 0
Paint Stairwell Walls - Block 0
Paint Stairwell Walls - Concrete 0
Paint Stairwell Wall Handrail 0
Paint Stair Stringer Edge 0
Paint Stair Riser & Tread & Landing Underside 0
Paint Stair Edge Handrail 0

Paint Floors

This is a section to be used for the painting of floors. There are no child folders in this section, as it directly contains all the conditions for the floor painting. All floors are taken off by SF. These are the conditions in this section:

- Floor Power Acid Wash
- Concrete Floor Sealer
- Concrete Floor Stain
- Concrete Floor Non-Traffic Enamel
- Concrete Traffic Wear Enamel
- Concrete Floor Paint

Paint Steel Shapes

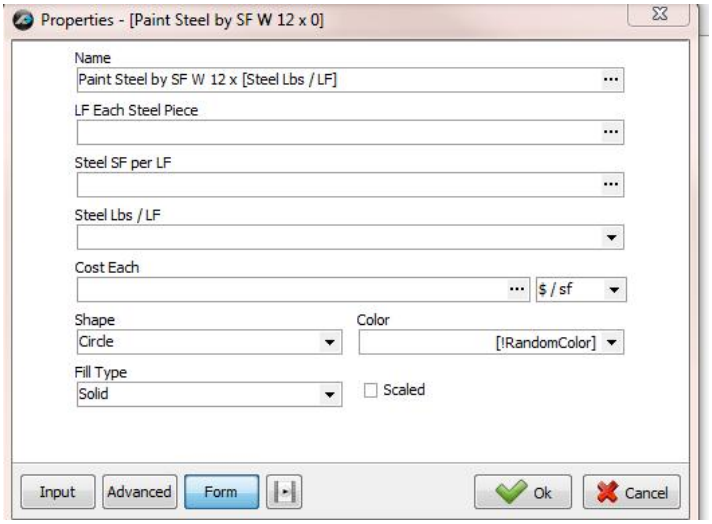
Painting Steel is much more complex than other issue. The shape of the steel determines the square foot of paint are per lineal feet of steel. All steel is calculated in rough this manner to determine the SF of the paint area.

Count of steel pieces x LF of each Steel x SF per LF of Steel = SF of Paint Area

The user must input the following

- LF of Each Steel Piece
- SF per LF of Steel
- Steel Weight per LF

Using the example of a W-Flange beam here is the properties box for input of this information.

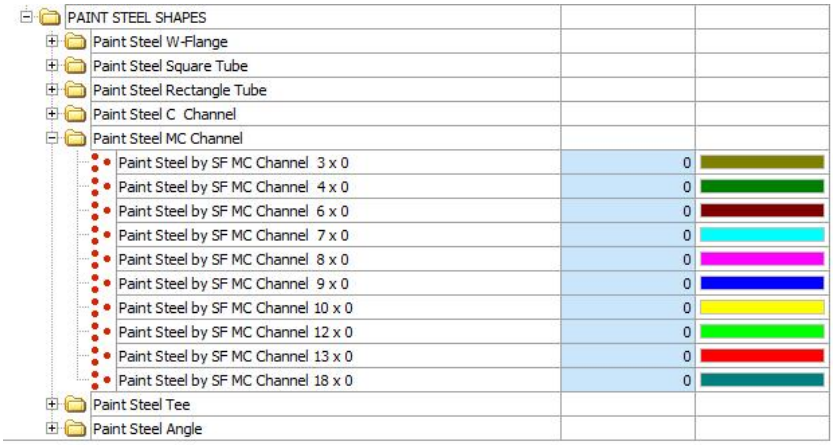


The questions might vary depending on the type of steel that is being painted. Also as a user be careful on the SF per LF you set up. This will vary depending on the position of the steel in the structure.

The following steel shapes are available for takeoff in the database.

- Paint Steel W-Flange
- Paint Steel Square Tube
- Paint Steel Rectangle Tube
- Paint Steel C Channel
- Paint Steel MC Channel
- Paint Steel Tee
- Paint Steel Angle

Each section has detailed conditions for each major size of steel. In general the thickness of the steel is not considered. For example the steel section with the MC Channel conditions opened is show here.


PAINT STEEL SHAPES
Paint Steel W-Flange
Paint Steel Square Tube
Paint Steel Rectangle Tube
Paint Steel C Channel
Paint Steel MC Channel
Paint Steel by SF MC Channel 3 x 0 0
Paint Steel by SF MC Channel 4 x 0 0
Paint Steel by SF MC Channel 6 x 0 0
Paint Steel by SF MC Channel 7 x 0 0
Paint Steel by SF MC Channel 8 x 0 0
Paint Steel by SF MC Channel 9 x 0 0
Paint Steel by SF MC Channel 10 x 0 0
Paint Steel by SF MC Channel 12 x 0 0
Paint Steel by SF MC Channel 13 x 0 0
Paint Steel by SF MC Channel 18 x 0 0
Paint Steel Tee
Paint Steel Angle

Support

The developer of this PlanSwift library has worked in the construction software database industry for 15 years and works daily with estimators of all types.

Database Solutions
planswift@database-solutions.com

Posted Mike Ramsey - May 7, 2012 at 3:29 PM. This article has been viewed 2673 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2255

Plumbing Standard

Article Number: 2254 | Rating: Unrated | Last Updated: Mar 20, 2012 at 2:40 PM

Plumbing Standard for plugin is a quick and easy database intended for swift takeoff of plumbing on a budget basis. This database covers all the major type of takeoff issues that a plumbing contractor will encounter.

To Install

Open PlanSwift.
Go to the "Setting" Tab
Click on the "Import Plugin Package"
Follow the directions provided by Planswift.
After installation you will find "Plumbing Standard" in the "Templates" Tab ready for your use.

To Uninstall

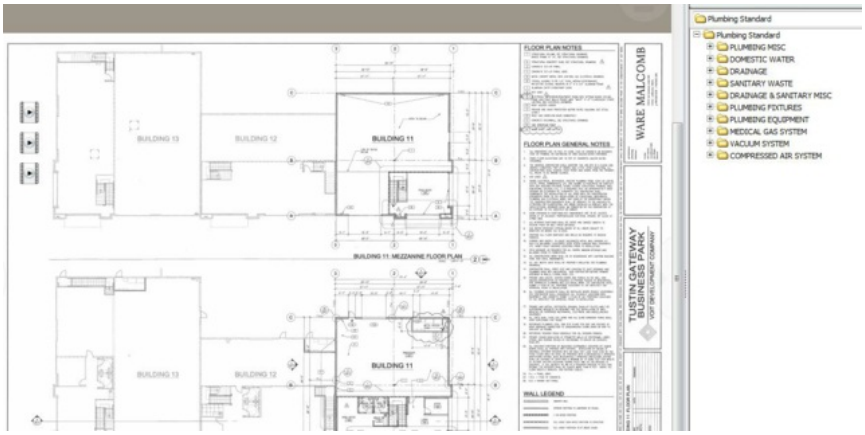
Go to the plugin store tab and select Uninstall Plugins

Plugin Sections

The database is sequenced into :

- Demo
- Domestic Water
- Drainage
- Sanitary Waste
- Drainage & Sanitary Misc
- Fixtures
- Plumbing Equipment
- Medical Gas System
- Vacuum System
- Compressed Air System

Takeoff View:
This is a screenshot of the takeoff window. Notice the sequence of the folders on the right side.



Each folder is discussed in detail below.

Demo

The Demo section provides takeoff for miscellaneous issues that a plumbing contractor will encounter such as demolitions and removal. The child folders here are:
Plumbing Demolition

- Plumbing Remove & Re-install
- Cut & Patch
- Core Drill at Floor
- Core Drill at Wall

To use this section open up the folder you wish, click on the green button to takeoff the condition and mark this condition on the drawings.

All conditions in this section are count activities.

Domestic Water

The domestic water section provides takeoff for water piping of different types and diameters. The piping is set up on a budget basis with the lineal footage of the pipe as the only takeoff consideration. This section is organized as a parent-child folder arrangement. Under each major folder is a child folder with the material spec of the pipe. The parent child folders are organized as follows:

- Domestic Water - Underground
  - Domestic Water Underground Copper Sweat
  - Domestic Water Underground Copper Press Fit
  - Domestic Water Underground CPVC Sch 80
  - Domestic Water Underground CPVC Flowguard
  - Domestic Water Underground PEX
- Domestic Water - Interior
  - Domestic Water Interior Copper Sweat
  - Domestic Water Interior Copper Press Fit
  - Domestic Water Interior CPVC Sch 80
  - Domestic Water Interior CPVC Flowguard
  - Domestic Water Interior PEX

Domestic Water Misc

- Water Manifold
- Water Flexible Connectors & Hose
- Water Backflow Preventer
- Water Anti Siphon Vacuum Breaker
- Water Pressure Regulators

In each child folders the takeoff conditions are there for the each size of pipe.

This is a screen shot of this section with one child folder opened up.

DOMESTIC WATER
Domestic Water - Underground
Domestic Water - Interior
Domestic Water Interior Copper Sweat
Interior Water Pipe Copper Sweat 1/4" 0
Interior Water Pipe Copper Sweat 3/8" 0
Interior Water Pipe Copper Sweat 1/2" 0
Interior Water Pipe Copper Sweat 5/8" 0
Interior Water Pipe Copper Sweat 3/4" 0
Interior Water Pipe Copper Sweat 1" 0
Interior Water Pipe Copper Sweat 1-1/4" 0
Interior Water Pipe Copper Sweat 1-1/2" 0
Interior Water Pipe Copper Sweat 2" 0
Interior Water Pipe Copper Sweat 2-1/2" 0
Interior Water Pipe Copper Sweat 3" 0
Interior Water Pipe Copper Sweat 4" 0
Interior Water Pipe Copper Sweat 5" 0
Interior Water Pipe Copper Sweat 6" 0
Domestic Water Interior Copper Press Fit
Domestic Water Interior CPVC Sch 80
Domestic Water Interior CPVC Flowguard
Domestic Water Interior PEX
Domestic Water Misc
Plumbing Pipe Insulation

The fittings of the pipe are not available in this section. There will soon be a different assembly template database for detailed pipe takeoff with fittings.

Drainage

The drainage section provides takeoff for drainage piping of different types and diameters. The piping is set up on a budget basis with the lineal footage of the pipe as the only takeoff consideration. This section is organized as a parent-child folder arrangement. Under each major folder is a child folder with the material spec of the pipe. The parent child folders are organized as follows:

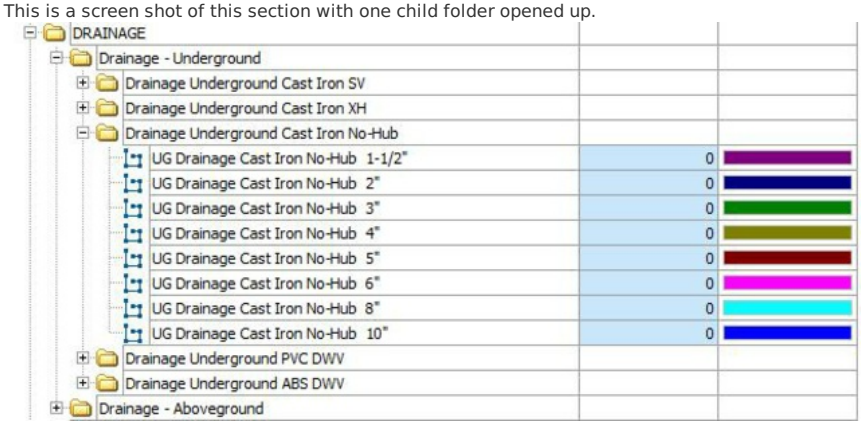
Drainage - Underground

- Drainage Underground Cast Iron SV
- Drainage Underground Cast Iron XH
- Drainage Underground Cast Iron Ho-Hub
- Drainage Underground PVC DWV
- Drainage Underground ABS DWV

Drainage - Aboveground

- Drainage Above Ground Cast Iron SV
- Drainage Above Ground Cast Iron XH
- Drainage Above Ground Cast Iron Ho-Hub
- Drainage Above Ground PVC DWV
- Drainage Above Ground ABS DWV

This is a screen shot of this section with one child folder opened up.


DRAINAGE
Drainage - Underground
Drainage Underground Cast Iron SV
Drainage Underground Cast Iron XH
Drainage Underground Cast Iron No-Hub
UG Drainage Cast Iron No-Hub 1-1/2" 0
UG Drainage Cast Iron No-Hub 2" 0
UG Drainage Cast Iron No-Hub 3" 0
UG Drainage Cast Iron No-Hub 4" 0
UG Drainage Cast Iron No-Hub 5" 0
UG Drainage Cast Iron No-Hub 6" 0
UG Drainage Cast Iron No-Hub 8" 0
UG Drainage Cast Iron No-Hub 10" 0
Drainage Underground PVC DWV
Drainage Underground ABS DWV
Drainage - Aboveground

Sanitary Waste

The Sanitary Waste section provides takeoff for waste piping of different types and diameters. The piping is set up on a budget basis with the lineal footage of the pipe as the only takeoff consideration.

This section is organized as a parent-child folder arrangement. Under each major folder is a child folder with the material spec of the pipe. The parent child folders are organized as follows:

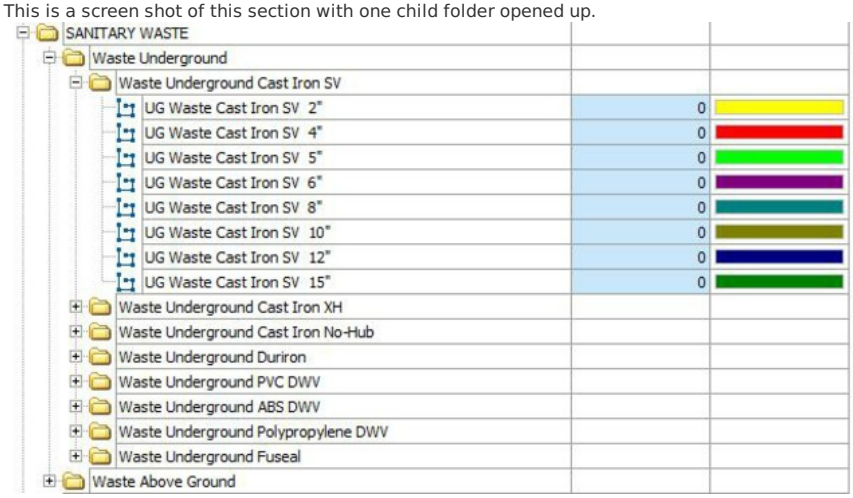
Waste - Underground

- Waste Underground Cast Iron SV
- Waste Underground Cast Iron XH
- Waste Underground Cast Iron Ho-Hub
- Waste Underground Duriron
- Waste Underground PVC DWV
- Waste Underground ABS DWV
- Waste Underground Polypropylene DWV
- Waste Underground Fuseal

Waste - Above Ground

- Waste Inside Cast Iron SV
- Waste Inside Cast Iron XH
- Waste Inside Cast Iron Ho-Hub
- Waste Inside Duriron
- Waste Inside PVC DWV
- Waste Inside ABS DWV
- Waste Inside Polypropylene DWV
- Waste Inside Fuseal
- Waste Copper DWV

This is a screen shot of this section with one child folder opened up.

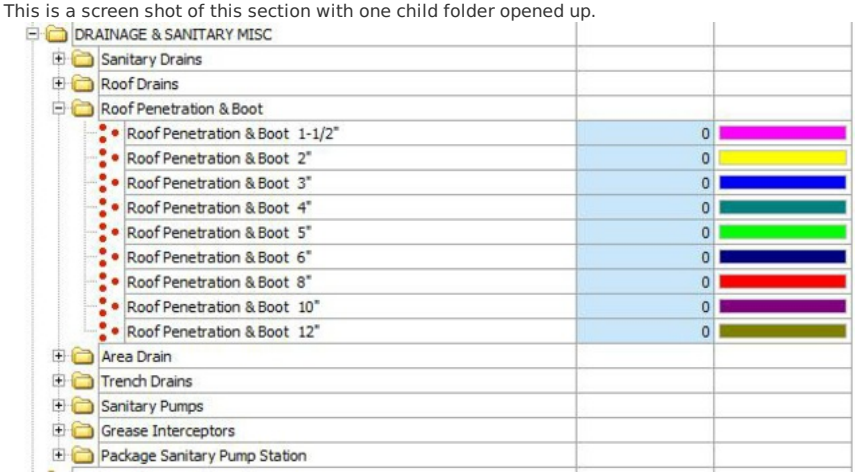

SANITARY WASTE
Waste Underground
Waste Underground Cast Iron SV
UG Waste Cast Iron SV 2" 0
UG Waste Cast Iron SV 4" 0
UG Waste Cast Iron SV 5" 0
UG Waste Cast Iron SV 6" 0
UG Waste Cast Iron SV 8" 0
UG Waste Cast Iron SV 10" 0
UG Waste Cast Iron SV 12" 0
UG Waste Cast Iron SV 15" 0
Waste Underground Cast Iron XH
Waste Underground Cast Iron No-Hub
Waste Underground Duriron
Waste Underground PVC DWV
Waste Underground ABS DWV
Waste Underground Polypropylene DWV
Waste Underground Fuseal
Waste Above Ground

Drainage & Sanitary Misc

The Drainage & Sanitary Misc section provides takeoff for miscellaneous issues of drainage and waste piping that you will encounter to takeoff. This is a section of equipment and fixtures required to be taken off with drainage and waste piping. Each child folder of the section has the conditions.

- Sanitary Drains
- Roof Drains
- Roof Penetration and Boot
- Area Drain
- Trench Drains
- Sanitary Pumps
- Grease Interceptors
- Package Sanitary Pump Station

This is a screen shot of this section with one child folder opened up.

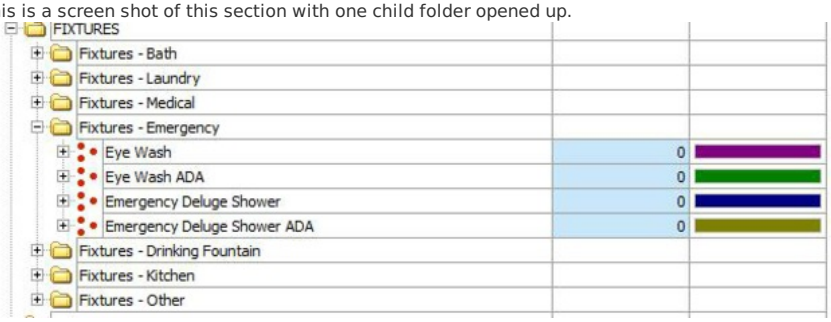

DRAINAGE & SANITARY MISC
Sanitary Drains
Roof Drains
Roof Penetration & Boot
Roof Penetration & Boot 1-1/2" 0
Roof Penetration & Boot 2" 0
Roof Penetration & Boot 3" 0
Roof Penetration & Boot 4" 0
Roof Penetration & Boot 5" 0
Roof Penetration & Boot 6" 0
Roof Penetration & Boot 8" 0
Roof Penetration & Boot 10" 0
Roof Penetration & Boot 12" 0
Area Drain
Trench Drains
Sanitary Pumps
Grease Interceptors
Package Sanitary Pump Station

Fixtures

The Fixtures section provides takeoff for all types of fixtures that you will need for standard takeoff issues. All fixtures are taken off by the count method. Each child folder of the section has the conditions.

Fixtures - Bath
Fixtures - Laundry
Fixtures - Medical
Fixtures - Emergency
Fixtures - Drinking Fountain
Fixtures - Kitchen
Fixtures - Other

This is a screen shot of this section with one child folder opened up.

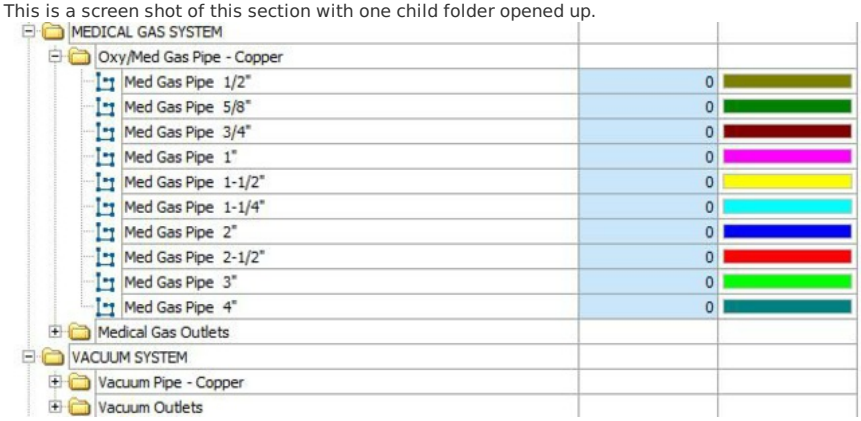


Medical Gas System and Vacuum System

The Medical Gas system and the Vacuum system both work in the same manner so they are discussed together. For each section there is a folder for the pipe, and then another folder for the outlets. The folders are as follows and each folder has the conditions you need for takeoff.

Medical Gas System
Oxy/Med GasPipe - Copper
Medical Gas Outlets
Vacuum System
Vacuum Pipe - Copper
Vacuum Outlets

This is a screen shot of this section with one child folder opened up.


MEDICAL GAS SYSTEM
Oxy/Med Gas Pipe - Copper
Med Gas Pipe 1/2" 0
Med Gas Pipe 5/8" 0
Med Gas Pipe 3/4" 0
Med Gas Pipe 1" 0
Med Gas Pipe 1-1/2" 0
Med Gas Pipe 1-1/4" 0
Med Gas Pipe 2" 0
Med Gas Pipe 2-1/2" 0
Med Gas Pipe 3" 0
Med Gas Pipe 4" 0
Medical Gas Outlets
VACUUM SYSTEM
Vacuum Pipe - Copper
Vacuum Outlets

Compressed Air System

The Compressed Air System is compressed of several folders with the compressed air pipe and drops then another folder for the equipment. The folders are as follows and each folder has the conditions you need for takeoff.

Compressed Air Pipe Copper
Compressed Air Pipe Black Steel
Compressed Air Pipe Gal Steel
Compressed Air Pipe Polypropylene
Compressed Air Equipment

This is a screen shot of this section with one child folder opened up. Notice the drops are with the pipe as a count condition.

COMPRESSED AIR SYSTEM		
Compressed Air Pipe Copper		
Compressed Air Pipe Copper 1/2"	0	
Compressed Air Pipe Copper 5/8"	0	
Compressed Air Pipe Copper 3/4"	0	
Compressed Air Pipe Copper 1"	0	
Compressed Air Pipe Copper 1-1/2"	0	
Compressed Air Pipe Copper 1-1/4"	0	
Compressed Air Pipe Copper 2"	0	
Compressed Air Pipe Copper 2-1/2"	0	
Compressed Air Pipe Copper 3"	0	
Compressed Air Pipe Copper 6"	0	
Compressed Air Pipe Copper 4"	0	
Compressed Air Drop Copper 1/2"	0	
Compressed Air Drop Copper 3/4"	0	
Compressed Air Drop Copper 1"	0	
Compressed Air Pipe Black Steel		
Compressed Air Pipe Gal Steel		
Compressed Air Pipe Polypropylene		
Compressed Air Equipment		

Upgrades

The Budget Concrete Template will receive an upgrade in the spring and fall of 2012. As a purchaser of the template you can receive this upgrade at no cost.

If you own the database I will put your suggestions into the upgrades. Just email the developer at planswift@database-solutions.com

Support

The developer of this PlanSwift library has worked in the construction software database industry for 15 years and works daily with estimators of all types.

Database Solutions
planswift@database-solutions.com

Posted Mike Ramsey - Mar 16, 2012 at 11:56 AM. This article has been viewed 2263 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2254

Symbol or Icon

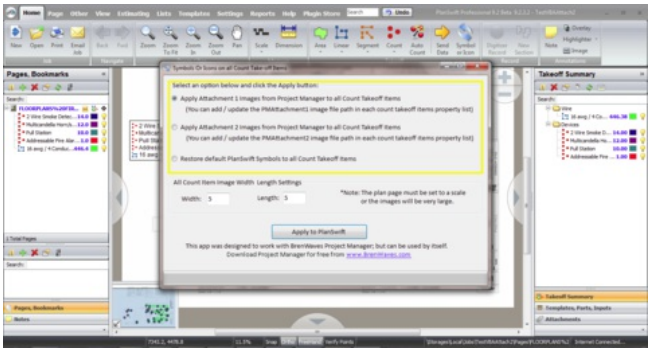
Article Number: 2252 | Rating: 4/5 from 1 votes | Last Updated: Nov 16, 2012 at 7:53 PM

The Symbol or Icon PlanSwift9 Plug-in will quickly toggle your takeoff count items between the default highlight color and 2 different images for each item stored on your PC. This is a great tool for using your PlanSwift takeoff in customer presentations or to print a takeoff with symbol images for use on projects on-site. When you run 1 of the plug-in options for the 1st time it will add the new image PMAttachment1 or PMAttachment2 file properties to all count items. You can then update each count item image in properties form view.
This plug-in was designed to interface with the images stored in the Project Manager software; which can be downloaded for free from www.BrenWaves.com. The Symbol or Icon PlanSwift9 Plug-in can also be used without the Project Manager software

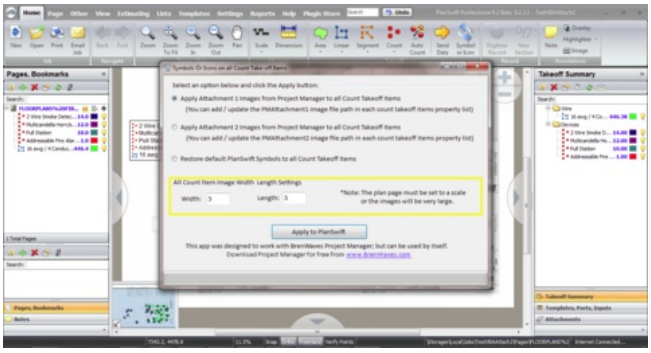
Below are instructions on how to use Symbol or Icon PlanSwift9 Plug-in:

The Symbol or Icon button is located within the Takeoff group on the Home tab in PlanSwift9.

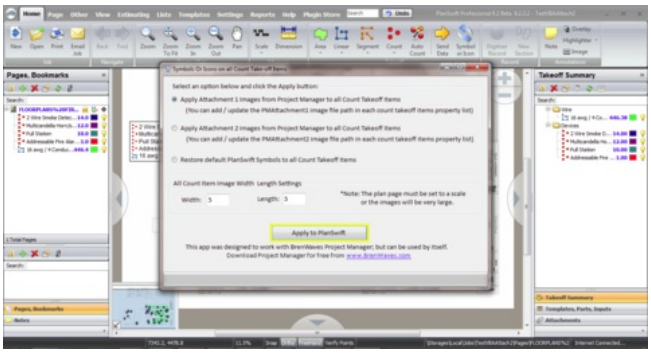
After clicking the Symbol or Icon button the options form appears with 3 options to choose from (the 1st option is chosen by default).



In order for the item images to display properly the plan needs to be set to scale (the plan scale can be applied before or after this plugin is used). By default all item images will be set to a width of 5 and length of 5 (this may need to be updated depending on the scale of your plan).

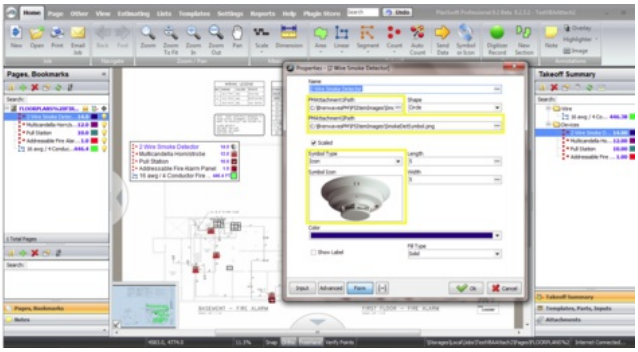


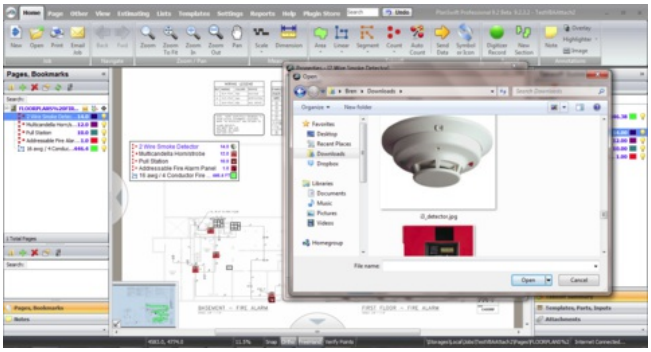
After choosing your option and count item image width & length settings you can then click on the Apply to PlanSwift button.



You will notice that the form closes and all of your count item highlights became images in PlanSwift9 (if you already have images related to each item).

Lets analyze what just happened here in this process. Double-click on 1 of the count items to see its properties. The Plugin adds 2 new properties PMAttachment1Path and PMAttachment2Path. If this is the 1st time the Plug-in runs then these 2 new properties will be empty. If you click on the â€¦ button at the far right of either of these properties you can then browse to an image stored on your computer. If there is an image path in the PMAttachment1Path property when the plugin runs then the image will be stored in the Symbol Icon property of this Takeoff item. The Symbol Type also changes from shape to Icon.

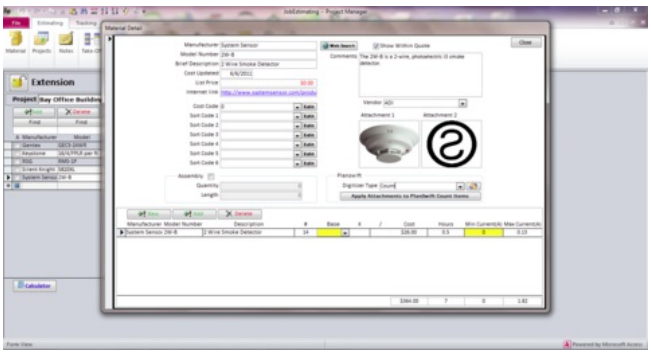




The Symbol or Icon PlanSwift9 Plug-in can be used as often as you wish. If the 2nd option is chosen then the PMAttachment2Path property is used to display another set of images.

If the 3rd option is chosen, then the default count highlights return.

The Symbol or Icon PlanSwift9 Plug-in is even more useful when used in conjunction with the Project Manager Software. In Project Manager two images can attach to each material item in its material database and be used with every project. So, when performing a takeoff with PlanSwift9 and interfacing all takeoff items with a Project Manager project; the Symbol or Icon PlanSwift9 Plug-in will automatically import the attached two images with each Project Manager material item into the two new PlanSwift9 properties. Thus, saving precious time and providing great visual benefits to your PlanSwift9 jobs.



As mentioned before; the Project Manager software can be downloaded for free from www.BrenWaves.com. If you have any questions or requests please send an email to support@BrenWaves.com.

Posted Mike Ramsey - Feb 17, 2012 at 4:25 PM. This article has been viewed 2050 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2252

Area Pro

Article Number: 1812 | Rating: Unrated | Last Updated: Aug 1, 2011 at 10:20 AM

Area Pro

Items Included:

- Items
- Area Pro
- Page Items
- Area Pro Section

Functionality
Area Pro Plug-in will install a new digitizer item, enables you to receive calculated information for Area Itemâ€™s with Subtraction about:

- Total Openings Area
- Total Openings Linear Total
- Gross Area
- Gross Linear Total
- Gross Volume

Installation

1. Open PlanSwift if it is not already open.
2. Go to "Download Plugins" Sidebar and make the necessary steps for downloading the plugin.
3. When download is finished choose â€

Posted Mike Ramsey - Aug 1, 2011 at 10:10 AM. This article has been viewed 1582 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1812

Select and Set

Article Number: 2269 | Rating: 4.1/5 from 7 votes | Last Updated: Nov 27, 2012 at 8:11 PM

Select and Set allows you to select sections and set properties on all the selected sections. You can use for multiplying your sections also.

How to use:
1. Select the sections of the items you want to set a property on.
2. Click on the Select and Set Icon (Home Tab).
3. Type in the property you want to set.
4. Type in the text value you want on that property you specified.

You can view in the Estimating tab (with sections showing) the properties you set on the sections. You can turn on show sections by clicking on the filter button and checking sections. Also add properties you want as columns with the columns button.

Warning:
Be very careful what property you set. It will overwrite the existing value on that property. May not work well with counts should work fine with label counts. Planswift does not provide support for this plugin.

Posted Mike Ramsey - Nov 8, 2012 at 2:41 PM. This article has been viewed 1576 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2269

Area Pro

Article Number: 2230 | Rating: Unrated | Last Updated: Dec 29, 2011 at 10:53 AM

Area Pro

This New Area Type will give you instant access to the following additional properties: - Openings Linear Total - Openings Area Total - Gross Linear Total - Gross Area - Gross Volume Now with script for calculating these properties for Default Area Type.

Items Included:

- Items

Area Pro

- Page Items

Area Pro Section

- Plugins

Gross Area, Linear Total, Volume

Functionality Area Pro Plug-in will install a new digitizer item, enables you to receive calculated information for:

- New Area Itemâ€™s with Subtraction about:
  - Total Openings Area
  - Total Openings Linear Total
  - Gross Area
  - Gross Linear Total
  - Gross Volume
  - **Option for creating Segments for Each Line in Area**

1. **Install Notes**
   1. Open PlanSwift if it is not already open.
   2. Go to â€žDownload Pluginsâ€

Posted Mike Ramsey - Dec 29, 2011 at 10:52 AM. This article has been viewed 1565 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2230

Schedule of Values Generator

Article Number: 2264 | Rating: 3.5/5 from 2 votes | Last Updated: Jul 9, 2012 at 8:01 PM

This Schedule of Values Generator is a price breakdown furnished by Contractor to Architect or from prime Subcontractor to Contractor. It allocates values for the various parts of the work such as Levels, Phases, Floors, Zones, etc. Then once established, is used for submitting and reviewing Pay Applications based on % completed to-date. The current Pay Application will pay the Contract Amount including Change Orders less Previous Pay amount and less Retainage.
This Schedule of Values Generator will allow User to set up the various parts of the work list, then from the Planswift takeoff the User will assign the work list item to the Planswift Takeoff on a row by row basis to generate the Schedule of Values.
Fixed values like Bond cost, mobilization, inspection fees, permits, etc. are set at the start. All other values are generated from the Takeoff and if the Total does not agree with the Contract Amount, User can adjust at the click of a button.

The user manual can be downloaded here!

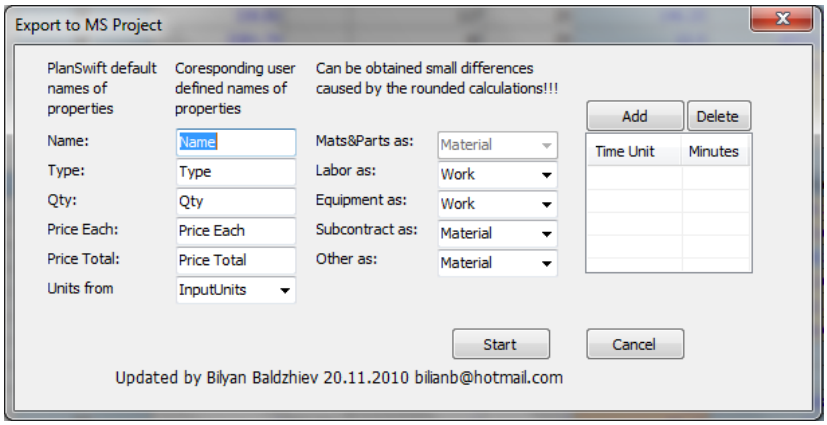
Posted Mike Ramsey - Jul 9, 2012 at 4:01 PM. This article has been viewed 1553 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2264

Export to MS Project for PlanSwift version 9

Article Number: 2227 | Rating: Unrated | Last Updated: Dec 28, 2011 at 3:12 PM

1. Main Form



1.1. PlanSwift default names of properties column and user defined names

Description: These fields are made for multi-language support and User Defined Export of Costs and Prices (where *Price Each* or *Cost Each* = MS Project *Resource Standard Rate* and *Price Total* or *Cost Total* = MS Project *Task or Assignment Costs*). In the main case, they do not need edition.

1.2. Parts exporting to Resources options

Description: Here are five combos. They manage the way that each different Part Type is exported to MS Project. Available options are: Material, Work and Cost (2007 and up).

1.3. The Logic of Export is (for now fixed L):

1.3.1. If Item Type is Folder, Digitizer or Assembly it will create Tasks;
1.3.2. If Item Type is Part, Material, Labor, Equipment, Sub or Other it will check Parts exporting options and create Resources and add Assignments(There is a check for resource uniqueness â€“ key is Part Type and Part Name)

1.4. The Result is a Copy of Estimating but in MS Project

BUT ONLY IF the logic of used methodology in estimating is equal to Logic of Export. In other words: in the estimating must not be used Items with Type â€˜ITEMâ€™ and Parts are Childs of â€˜Tasksâ€™ and do not have their own SubChilds.

Posted Mike Ramsey - Dec 28, 2011 at 3:10 PM. This article has been viewed 1453 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2227

Multiline Tool

Article Number: 2270 | Rating: 3/5 from 2 votes | Last Updated: Jan 30, 2013 at 3:44 PM

Multiline Tool

Items Included:

Multiline

Requirements

No special requirements.

Install Notes

Files Needed Multiline.SwiftPluginPackage from PlanSwift Plugin Store

Steps

1. Open PlanSwift if it is not already open.
2. Go to Plugin Store Tab and make the necessary steps for downloading the plugin.
3. When download is finished choose "Open". This will process the installation.

After installation you will find Multiline Tool in Linear Dropdown Menu on the Home Menu Tab.

Removal Notes

Steps

1. Open PlanSwift if it is not already open.
2. Go To Plugin Store Tab
3. Click on the Uninstall Plugin button in Plugin Tools Section
4. Choose "Multiline" and proceed with Next

Usage

This tool is for fast drawing of a multiple parallel lines.

Custom options include:

- # of Lines – Number of additional elements, that will be created ·
- Offset – Distance between elements ·
- Justification – the side where the additional sections(items) will be created ·
- Each Section As New Item ChekBox ·
- New Item Type List ·
- Auto Generate ChekBox

Methods(available in Multiline Section Only -)

1. Draw Multiline – for drawing the additional sections for first time
2. Refresh Multiline – for redrawing additional sections in these events
    - OnPointMoved

Posted Mike Ramsey - Jan 30, 2013 at 3:39 PM. This article has been viewed 916 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2270

Shape Stamper

Article Number: 2271 | Rating: 5/5 from 1 votes | Last Updated: Mar 19, 2013 at 3:09 PM

How to use:

1. Select the section you want the shape of.
2. Click on the "Get Shape" icon on the top bar.
3. Select the sections you want to apply that shape to.
4. Click on the "Stamp Shape" icon on the top bar.

You can select a item and get its shape. Then stamp out other items with that same shape.

Warning:
AS IS
Be very careful.
It will overwrite the existing value on the DigitizerData property.
May not work well with counts because you may have double stacked nodes which will make two counts on top of each other. Depending on how you recorded the item you got the shape from.

PlanSwift does not provide support for this plug-in.

Video:

Posted Mike Ramsey - Mar 19, 2013 at 3:09 PM. This article has been viewed 503 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2271

GC Commercial Database

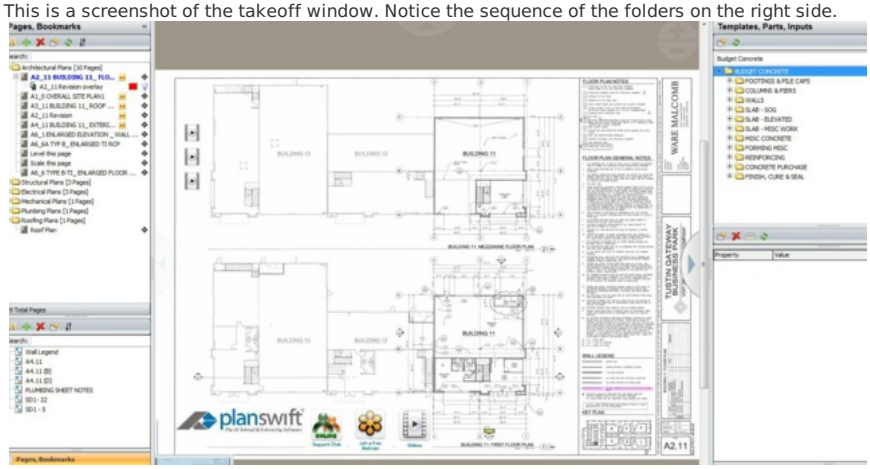
Section 03 Concrete

Article Number: 2236 | Rating: Unrated | Last Updated: Jan 4, 2012 at 3:18 PM

Section 03 Concrete
The section for Sitework is quick and easy section intended for budget style takeoff of concrete work. This section is not intended for a Concrete Contractor. There will soon be a template for this discipline. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the folders on the right side.



03 Concrete

The concrete section is sequenced into :

- Footings & Pile Caps
- Columns & Piers
- Walls
- Slab - SOG
- Slab - Elevated
- Slab - Misc Work
- Misc Concrete
- Reinforcing
- Concrete Purchase
- Finish, Cure & Seal

Footings & Pile Caps

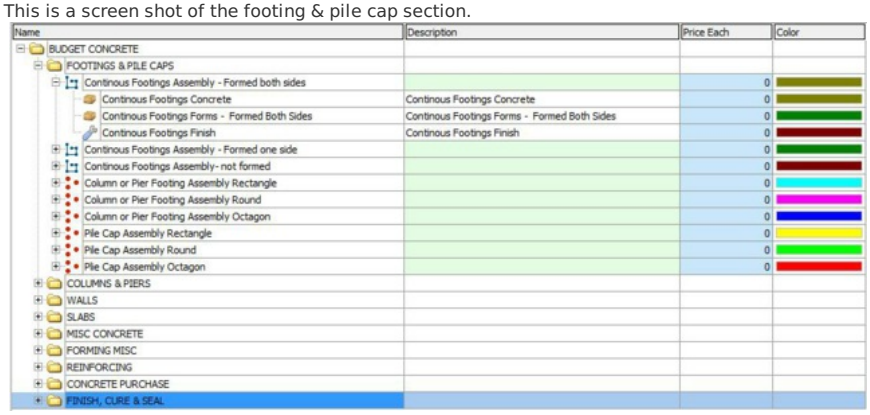
The footings & pile cap section provides takeoff of concrete, forms and finish for the following conditions:
Continuous Footings Assembly - Formed both sides
Continuous Footings Assembly - Formed one side
Continuous Footings Assembly - not formed
Column or Pier Footing Assembly Rectangle
Column or Pier Footing Assembly Round
Column or Pier Footing Assembly Octagon
Pile Cap Assembly Rectangle
Pile Cap Assembly Round
Pile Cap Assembly Octagon

The assemblies for round shape will use the diameter for both the forming and volume calculations.

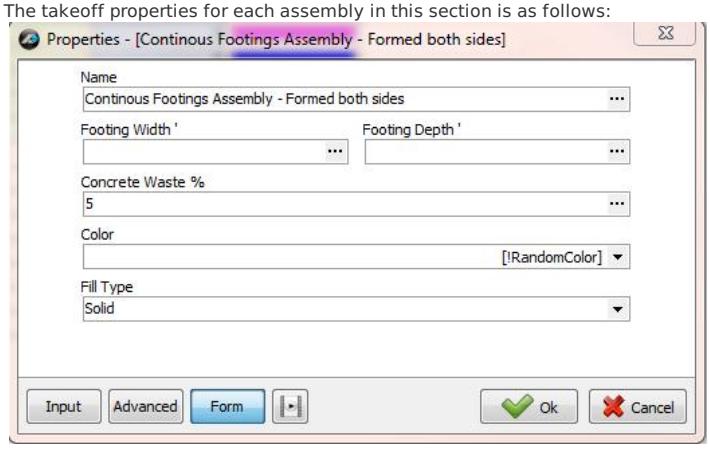
The assemblies for octagon will use the lineal foot of one side of the octagon for the forming and volume calculations.

Each assembly has a part for the takeoff of the concrete, the forming, and the finish.

This is a screen shot of the footing & pile cap section.



The takeoff properties for each assembly in this section is as follows:



The user will input the dimension information based on the geometry of the condition and revise the waste if desired.

Columns & Piers

The columns & Piers section provides takeoff of concrete, forms and finish for the following conditions:
Columns - Rectangle
Columns - Round
Columns - Octagon
Piers - Rectangle
Piers - Round
Piers - Octagon
Sonotube Concrete

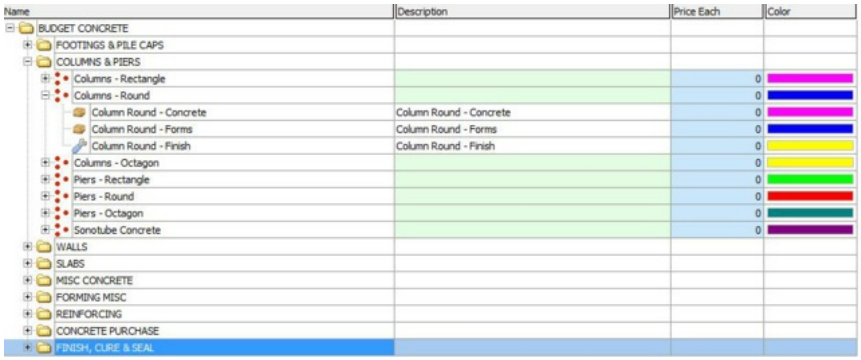
The assemblies for round shape will use the diameter for both the forming and volume calculations.

The assemblies for octagon will use the lineal foot of one side of the octagon for the forming and volume calculations.

The assembly for sonotube allows for sonotube of 8 inches to 42 inches in all standard diameters for sonotube.

Each assembly has a part for the takeoff of the concrete, the forming, and the finish.

This is a screen shot of the Columns & Piers section



Walls

The Walls section provides takeoff of concrete, forms, bulkhead form, and finish for the following conditions:
Wall Concrete
Grade Beam
Stem Wall
Pilasters @ Concrete Wall
Wall Brickshelf
Wall Boxout by Count
Sonotube Concrete

The assembly for walls and grade beam allows for the takeoff of:
- Wall Concrete
- Wall Form
- Wall Bulkhead Form
- Wall Column Beam Pockets
- Wall Top Finish

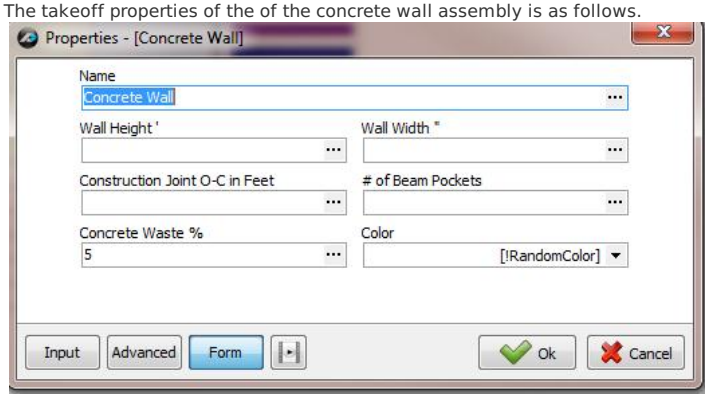
The assembly for stem wall allows for the takeoff of:
- Wall Concrete
- Wall Form
- Wall Top Finish

The assembly for pilasters allows for the takeoff of:
- Wall Concrete
- Pilaster Wall Form
- Pilaster Top Finish

The assembly for wall Brickshelf allows for the takeoff of:
- Brickshelf concrete Deduct
- Brickshelf Form

The Wall Boxout assemblies allow for the takeoff of:
- Wall Boxout Concrete Deduct
- Wall Boxout Form

The takeoff properties of the of the concrete wall assembly is as follows.



Slab - SOG

The SOG section provides a series of assemblies for taking off different types and conditions of typical slab on grade conditions. The takeoff assemblies are as follows:
Mud Slab
Column Diamonds
SOG Exterior - Edge Formed all Sides
SOG Interior - No Edge Form
SOG Construction Joint Form
SOG Thickened Edge
SOG Thickened Slab by LF
SOG Thickened Slab by Area
SOG Boxout

The assembly for **Mud Slab** allows for the concrete - form - finish takeoff of a mud slab in the construction work zone.

The assembly for **Column Diamonds** is specific to takeoff the column diamonds of an interior SOG. This is a count assembly where you count the column diamonds then in the properties set the length and width of the diamond

The assembly for **SOG Exterior - Edge Formed all Sides** is for exterior SOG in which the entire slab is formed

The assembly for **SOG Interior - No Edge Form** is for interior SOG in which the slab is poured up against a wall and therefore an expansion joint is required in lieu of the edge form.

The assembly for **SOG Construction Joint Form** is specifically to take off the bulkhead construction joint form of larger SOG when you have to pour the larger slab in pours by bays.

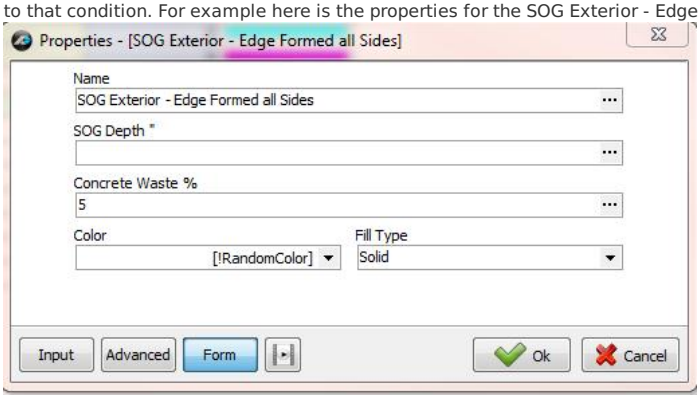
The assembly **SOG Thickened Edge** is specific for the thickened edge portion only of a SOG. This assembly only brings in the additional formwork and required for the thickened edge. The thickened edge is assumed to be monolithic with the slab. The interior side is assumed to slope at a 45 degree angle up to the nominal SOG. This is concrete only as there is no forming for this condition.

The assembly **SOG Thickened Slab by LF** is for a thickened section of the slab in the interior of the SOG that is take off by lineal feet. For example along a bearing wall line where the SOG is thicker for structural reasons. The slope on both sides is assumed to be at a 45 degree angle. This is concrete only as there is no forming for this condition.

The assembly **SOG Thickened Slab by Area** is for a thickened section of the slab in the interior of the SOG that is take off by area SF. For example at a chimney area where extra support is required. The calculation is a straight area times depth for the concrete. Since the slope on the edge is not taken into account the waste is changed to 10 %. Increase the waste if you desire. This is concrete only as there is no forming for this condition.

The assembly for the **SOB Boxout** is specific to the Boxout of a slab. This assembly will give you the items for the deduct of the concrete in the SOG and the add for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

For each of the above assemblies in the properties window you will be asked in the questions pertaining to that condition. For example here is the properties for the SOG Exterior - Edge Formed all Sides.



Slab - Elevated

The elevated slab section provides a series of assemblies for taking off different types and conditions of typical elevated slabs. This includes both slab on metal deck, structural slabs, and pan or dome slabs. The takeoff assemblies are as follows:
Slab on Metal Deck
Slab on Metal Deck Construction Joint
Slab on Metal Deck Boxout
Structural Slab
Pan Slab
Structural or Pan Slab Boxout
Structural or Pan Slab Construction Joint

The assembly for **Slab on Metal Deck** is for a slab on metal deck and the exterior edge form. This assembly will use the average depth of the metal deck concrete. This takes into account the concrete in the flukes of the metal deck. The average depth should be provided by the deck supplier.

The assembly for **Slab on Metal Deck Construction Joint Form** is specifically to take off the bulkhead construction joint form of larger slab when you have to pour the larger slab in pours by bays.

The assembly for the **Slab on Metal Deck Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the ad for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for the **Structural Slab** is specific to a self supporting structural slab that is bottom formed and supported with shoring till the concrete is cured. Additional lines for the bottom form and the shoring are added. The shoring is calculated in cubic feet , therefore the properties will ask for the height above the finish floor of the structural slab.

The assembly for the **Pan Slab** is specific to a self supporting pan filled structural slab that is bottom

formed and supported with shoring till the concrete is cured. Additional lines for the bottom form and the shoring are added. The shoring is calculated in cubic feet , therefore the properties will ask for the height above the finish floor of the structural slab.

The assembly for the Structural or **Pan Slab Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the add for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for the **Structural or Pan Slab Construction Joint** is specifically to take off the bulkhead construction joint form of larger slab when you have to pour the larger slab in pours by bays.

Slab - Misc Work

The Miscellaneous Work slab section provides a series of assemblies for taking off different types of slabs.
Topping Slab
Topping Slab Construction Joint
Topping Slab Boxout
Equipment Pad

The assembly for **Topping Slab** is for a the topping slab that is poured for the finish surface on a slab. In this case the topping slab is not designated as being on grade or elevated, but as a topping slab. The assembly brings in the concrete, forms, and finish of the topping slab.

The assembly for **Topping Slab Construction Joint** is specifically to take off the bulkhead construction joint form of the topping slab when you have to pour the larger slab in pours by bays.

The assembly for the **Topping Slab Boxout** is specific to the Boxout of the slab. This assembly will give you the items for the deduct of the concrete in the slab and the ad for the Boxout form. This is an alternative to the using the Boxout feature in the area calculation.

The assembly for **Equipment Pad** is used to takeoff the misc equipment pads that you will have for equipment settings.

Misc Concrete

The Miscellaneous Concrete section provides a place for sidewalk and metal pan stair assemblies. The assemblies in this section are as follows:
Sidewalk by LF
Sidewalk by Area
Metal Pan Landings
Metal Pan Risers

The assembly **Sidewalk by LF** is intended to for sidewalks where the user would like to takeoff the sidewalk by the lineal foot. Takeoff the sidewalk by the lineal feet of the centerline of the walk. This assembly will take off the forming, concrete, finish and the liquid curing white pigment finish used on sidewalks. The sidewalk concrete depth is set to 4" and the width is set to 4'. These are the normal dimensions for sidewalks but can be changed by the user if desired.

The assembly **Sidewalk by Area** is intended to for sidewalks where the user would like to takeoff the sidewalk by the area square foot. This assembly will take off the forming, concrete, finish and the liquid curing white pigment finish used on sidewalks. The sidewalk concrete depth is set to 4" as this is the normal depth of sidewalks, but can be changed by the user is need be. The edge form calculation will use the external lineal feet of area.

The assembly **Metal Pan Landings** is intended for takeoff of the metal pan landings of a stairwell. Count the landings with the takeoff and input at the properties tab for the input of the lending length, width, and the depth of the concrete.

The assembly **Metal Pan Risers** is intended for takeoff of the metal pan riser of a stairwell. Count the risers with the takeoff and input at the properties tab for the input of the riser, width, and the depth of the concrete.

Forming Misc

The Forming Misc section provides a place for other forming issues that the user may wish to takeoff. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. This section is broken down as follows:
Keyway & Chamfer
Vapor Barriers
Anchor Bolts & Templates
Rigid Insulation
Set Steel in Concrete
Crack Control

The section for **Keyway & Chamfer** holds the items for keyway for 2x4, 2x6, and upset keyway. Also Edge chamfer item is here.

The section for **Vapor Barriers** contains the vapor barriers in 4 mill, 6 mill and for moistop.

The section for **Anchor Bolts & Templates** contains anchor bolts from 1/2" up to 2" in all nominal

sizes. Also included are anchor bolt templates for 2-4-6-and 8 anchor bolt sets.

The section for **Rigid Insulation** contains rigid insulating for both under slab and foundation insulation form 1" to 3" in all nominal sizes in between.

The section for **Set Steel in Concrete** contains numerous types of embedded steel shapes and conditions.

The section for **Crack Control** contains conditions for saw cut of slab, zip strips and hand tool of joints.

Reinforcing

The Reinforcing section provides a place for reinforcing issues that the user other forming issues that the user may wish to takeoff. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. This section is broken down as follows:

- Rebar
- Rebar CAD Weld Connections
- Rebar Threaded Connectors
- Rebar Dowels
- Welded Wire Mesh

This section will be greatly upgraded in the next release of this database.

The **Rebar** section provides conditions for all nominal rebar sizes from #3 to # 14.

The **Rebar CAD Weld Connections** section provides conditions for all rebar CAD weld connections in al nominal rebar sizes from #3 to # 14.

The **Rebar Threaded Connectors** section provides conditions for all rebar threaded connections in all nominal rebar sizes from #3 to # 14.

The **Rebar Dowel** section provides conditions for all rebar dowels in all nominal rebar sizes from #3 to # 8

The **Welded Wire Mesh** section provides area SF conditions for every wire mesh size available.

Finish, Cure & Seal

The Finish, Cure & Seal section provides a place for finishing activities to placed concrete. The point of the entire database is for budget concrete so these specific conditions are not a part of the assemblies that are listed above. This section is not set up as assemblies but as a section to takeoff the parts for all these conditions. The section is broken down as follows:

- Finish Flatwork
- Other Finish
- Concrete Rubbing & Grind
- Curing
- Seal & Hardener

The **Finish Flatwork** Section is the placeholder for specific finish options, color, and shake on products.

The **Other Finish** Section is a place for top of wall and stair finish.

The **Concrete Rubbing & Grind** Section is the p[lace for grind, sandblast, rubbing, and bush hammer of the concrete finish.

The **Curing** Section provides other options for curing.

The **Seal & Harder** section provides for specific types of sealers and hardeners

Posted Mike Ramsey - Jan 4, 2012 at 3:18 PM. This article has been viewed 1902 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2236

Section 06 Carpentry

Article Number: 2241 | Rating: Unrated | Last Updated: Jan 11, 2012 at 10:27 AM

Section 06 Carpentry

The section for Rough & Finish Carpentry is quick and easy database intended for swift takeoff of division 6 for a general contractor. This section is based on Carpentry from the perspective of a commercial general contractor, and is not intended for residential construction. Although many of the sections and conditions will work in residential, many additional items will need to be added. A

residential template will be available in 2012.

This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

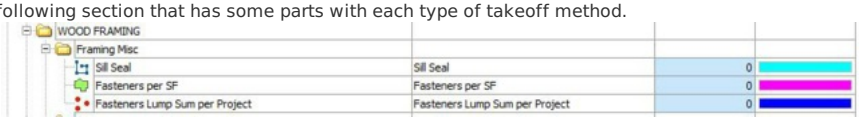
This is a screenshot of the takeoff window. Notice the sequence of the rough and finish carpentry folders on the right side.

In this view the folder for Rough and Finish Carpentry is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

Rough Carpentry

The Sitework section is sequenced into :

- Wood Framing
- Blocking & Furring
- Sheathing
- Exterior Trim & Siding

In turn each of these folders opens up additional folders for specific takeoff issues.

Wood Framing

The Wood Framing section is sequenced into :

- Framing Misc.
- Framing - Wood Wall
- Framing - Wood Floor Joists & Deck
- Framing - Roof Framing
- Framing - Roof Openings
- Framing Lumber
- Wood Truss
- Wood Columns

In turn each of these folders opens up for additional conditions for each section. All of these sections contain conditions for the takeoff of the specific carpentry section.

Blocking & Furring

The Blocking & Furring section is sequenced into :

- Interior Blocking
- Roof Blocking
- Door -Window Blocking
- Furring

In turn each of these folders opens up for additional conditions for each section. All of these sections contain conditions for the takeoff of the specific carpentry section.

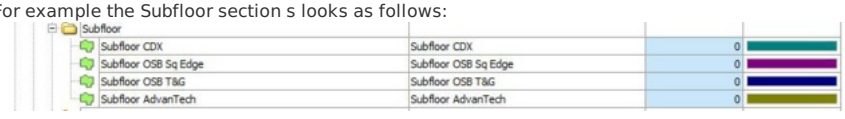
Sheathing

The Blocking & Furring section is sequenced into :

- Exterior Wall Sheathing
- Roof Sheathing
- Subfloor
- Underlayment

In turn each of these folders opens up for additional conditions for each section. All of these sections contain conditions for the takeoff of the specific carpentry section.

For example the Subfloor section s looks as follows:



Exterior Trim & Siding

The exterior Trim & Siding section is sequenced into :

- Exterior Trim Labor
- Trim Lumber #2 Pine
- Trim Lumber Select Pine
- Trim Lumber Red Cedar
- Trim Lumber PVC Trim

In turn each of these folders opens up for additional conditions for each section. All of these sections contain conditions for the takeoff of the specific carpentry section.

Section 06 Finish Carpentry

The section for Finish Carpentry is quick and easy database intended for swift takeoff of Finish Carpentry for a general contractor. This section is based on Finish Carpentry from the perspective of a commercial general contractor, and is not intended for residential construction.

Finish Carpentry

The Sitework section is sequenced into :

- Cabinets Install
- Purchase Cabinets
- Countertops
- Wall Paneling
- Running & Standard Trim

In turn each of these folders opens up to conditions or additional folders for specific takeoff issues.

Running & Standing Trim

The Running & Standing Trim section is sequenced into :

- Baseboard
- Chair Rail
- Map & Picture Rail
- Partition Top Cap
- Cornice Molding
- Crown Molding
- Cove Molding
- Doors & Window Trim

In turn each of these folders opens up for additional conditions for each section. All of these sections are similar, but the types of conditions will vary based on the type of finish trim.

Upgrades

The 06 Rough & Finish Carpentry section will be receiving a significant upgrade in the spring of 2012.

Posted Mike Ramsey - Jan 11, 2012 at 10:27 AM. This article has been viewed 1770 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2241

GC Commercial Database General Information

Article Number: 2233 | Rating: Unrated | Last Updated: Jan 4, 2012 at 1:48 PM

GC Commercial Database

General Information

To Install

Open PlanSwift.
Click on the "Download Plugins"
Find the GC Commercial Database
Click on the "Import Plugin Package"
Follow the directions provided by Planswift.
After installation you will find "GC Commercial" in the "Templates" Tab ready for your use.

To Delete

Go to the "Templates" Tab
Right click on the "GC Commercial Tab
Click on "Delete Tab"

Upgrades

The GC Commercial database-Template will receive substantial upgrades in 2012. This set of data will be upgraded in each quarter of 2012, roughly in February, May, August, and November. Provided you purchase the database you will receive these upgrades at no additional cost to the end of 2012.

Have something you wish to see in the upgrades ? If you own the database we will strongly consider you suggestions and put into the upgrades. Just email the developer at planswift@database-solutions.com

Support

The developer of this PlanSwift library has worked in the construction software database industry for 15 years and works daily with estimators of all types. If you wish for assistance with support for the database please contact at:

Database Solutions
207-363-1192
planswift@database-solutions.com

Posted Mike Ramsey - Jan 4, 2012 at 1:48 PM. This article has been viewed 1608 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2233

Section 09 Finishes

Article Number: 2244 | Rating: Unrated | Last Updated: Jan 11, 2012 at 10:56 AM

Section 09 Finishes

The section for Finishes is quick and easy database intended for swift takeoff of division 9, Finishes, for a general contractor. This section is based on the perspective of a commercial general contractor.

This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the finish folders on the right side.

In this view the folder for Finishes is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section that has some parts with each type of takeoff method.

Notice the area, linear, and count designations for each condition.

Folders

The Finishes section is sequenced into the following folders:

- Drywall & Studs
- Ceramic & Quarry Tile
- Flooring
- Coatings

In turn each of these folders will open up additional folders for specific takeoff issues.

Drywall & Studs

The Drywall & Studs section is sequenced into the following folders:

- Drywall Budget Prices
- Metal Studs 1-5/8"
- Metal Studs 2-1/2"
- Metal Studs 3-5/8"
- Metal Studs 4"
- Metal Studs 6"
- Metal Studs 8"
- Shaft Wall Studs & Shaft Wall
- GWB Ceiling Framing
- GWB 5/8"
- GWB 1/2"
- Taping by Sub
- Taping @ Wall Self Performed
- Taping @ Ceiling Self Performed
- Bead & Control Joint

In turn each of these folders will open up with additional conditions for each specific type of takeoff.

Ceramic & Quarry Tile

The Ceramic & Quarry Tile section is sequenced into the following folders:

- Ceramic Tile
- Cast Stone Tile
- Quarry Tile
- Terrazzo Flooring

In turn each of these folders will open up with additional conditions for each specific type of takeoff.

Flooring

The Flooring section is sequenced into the following folders:

- Carpet
- Floor Base
- Resilient VCT
- Wood Floors
- Stone Flooring
- Specialty Warming

In turn each of these folders will open up with additional conditions for each specific type of takeoff

Ceilings

The Ceiling section is sequenced into the following folders:

- Ceilings Tile
- Ceilings Metal
- Ceiling Sound Blanket

In turn each of these folders will open up with additional conditions for each specific type of takeoff

Coatings

The Coatings section is sequenced into the following folders:

- Painting Interior
- Painting Exterior

In turn each of these folders will open up with additional conditions for each specific type of takeoff

Each child folder will contain the conditions for takeoff. For example here is the conditions in the folder for Interior Painting.

Painting Interior
Paint GWB Wall 1 Sided
Paint GWB Wall 2 Sided
Paint Concrete-CMU Wall 1 Sided
Paint Concrete-CMU Wall 2 Sided
Paint GWB Ceiling
Paint Ceiling Metal Deck on Beams
Paint Frame & Door - Single
Paint Ceiling Metal Deck on Joists
Paint Frame & Door - Double
Paint Window - Small
Paint Window - Average
Paint Window - Large

Posted Mike Ramsey - Jan 11, 2012 at 10:56 AM. This article has been viewed 1532 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2244

Section 02 Demo

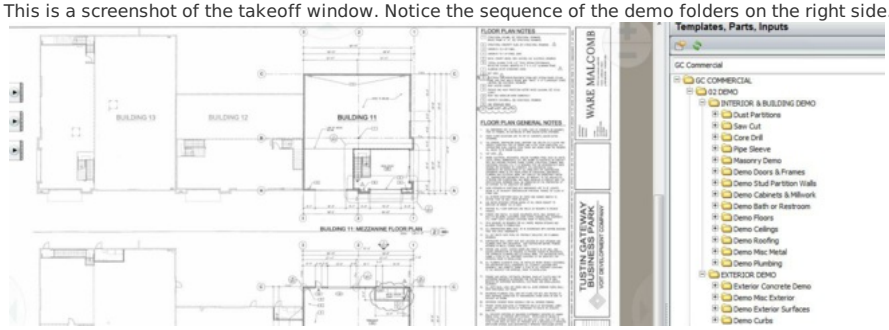
Article Number: 2234 | Rating: Unrated | Last Updated: Jan 4, 2012 at 2:10 PM

Section 02 Demo

The section for demolition is a quick and easy database intended for swift takeoff of demo for a GC. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

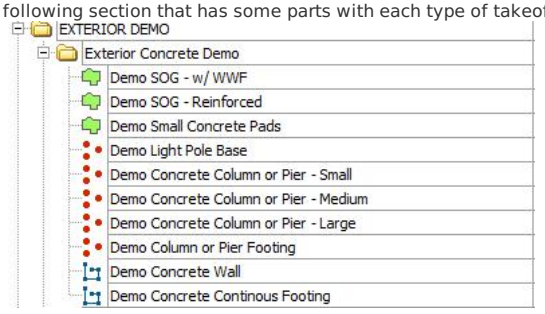
This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.



Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section that has some parts with each type of takeoff method.


EXTERIOR DEMO
Exterior Concrete Demo
Demo SOG - w/ WWF
Demo SOG - Reinforced
Demo Small Concrete Pads
Demo Light Pole Base
Demo Concrete Column or Pier - Small
Demo Concrete Column or Pier - Medium
Demo Concrete Column or Pier - Large
Demo Column or Pier Footing
Demo Concrete Wall
Demo Concrete Continous Footing

Notice the area, linear, and count designations for each condition.

02 Demo Sections

The demo section is sequenced into :

- Exterior Demo
- Interior & Building Demo

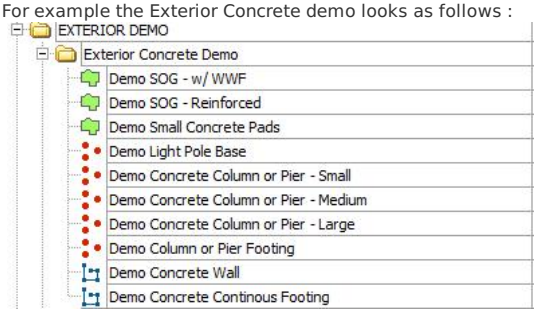
Exterior Demo

The exterior demo section is further broken down into :

- Exterior Concrete Demo
- Demo Misc Exterior
- Demo Exterior Surfaces
- Demo Curbs

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

For example the Exterior Concrete demo looks as follows :


EXTERIOR DEMO
Exterior Concrete Demo
Demo SOG - w/ WWF
Demo SOG - Reinforced
Demo Small Concrete Pads
Demo Light Pole Base
Demo Concrete Column or Pier - Small
Demo Concrete Column or Pier - Medium
Demo Concrete Column or Pier - Large
Demo Column or Pier Footing
Demo Concrete Wall
Demo Concrete Continous Footing

Interior Demo

The interior demo section is further broken down into :

- Dust Partitions
- Saw Cut
- Core Drill
- Pipe Sleeves
- Masonry Demo
- Demo Doors & Frames
- Demo Stud Partition & Millwork
- Demo Bath or Restroom
- Demo Floors
- Demo Ceilings
- Demo Roofing
- Demo Misc Metal
- Demo Plumbing

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

For example the Demo Door & Frames folder looks as follows :

Posted Mike Ramsey - Jan 4, 2012 at 2:10 PM. This article has been viewed 1332 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2234

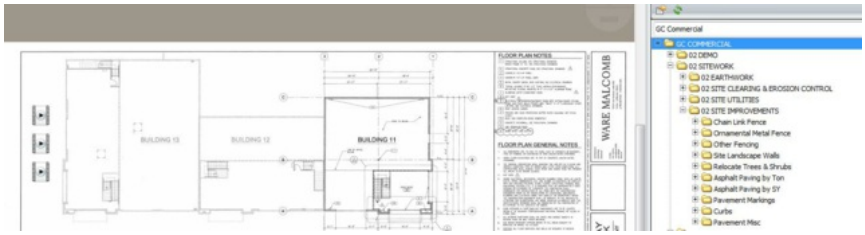
Section 02 Sitework

Article Number: 2235 | Rating: Unrated | Last Updated: Jan 4, 2012 at 2:48 PM

The section for Sitework is quick and easy database intended for swift takeoff of Sitework for a GC. This section is not intended for a Site Utilities contractor. There will soon be a template for this discipline. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the Sitework folders on the right side.

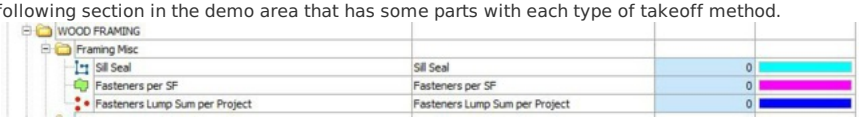


In this view the folder for Site Improvements is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

02 Sitework

The Sitework section is sequenced into :

- Earthwork
- Site Clearing & Erosion Control
- Site Utilities
- Site Improvements

In turn each of these folders opens up additional folders for specific takeoff issues.

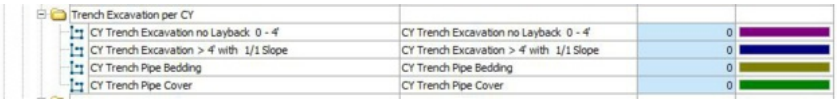
Earthwork

The Earthwork section is further broken down into :

- Grading
- Excavation & Backfill
- Trench Excavation per LF
- Trench Excavation per CY
- Dewatering
- Pipe Jacking & Boring

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

For example the Trench Excavation per CY section looks as follows:


Trench Excavation per CY
CY Trench Excavation no Layback 0 - 4'
CY Trench Excavation no Layback 0 - 4'
0
CY Trench Excavation > 4' with 1/1 Slope
CY Trench Excavation > 4' with 1/1 Slope
0
CY Trench Pipe Bedding
CY Trench Pipe Bedding
0
CY Trench Pipe Cover
CY Trench Pipe Cover
0

Note that earthwork section is designed for quick takeoff only and not intended for in depth analysis of Sitework excavation and backfill issues. For this type of analysis there are other programs and plugin for Planswift.

Site Clearing & Erosion Control

The Site Clearing and Erosion control section is further broken down into :

- Site Clearing
- Strip Topsoil
- Erosion Control

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

Site Utilities

The Site Utilities section is further broken down into :

- Site Pipe - DI Pipe
- Site Pipe - C-160
- Site Pipe - C-900 Pressure Class
- Site Pipe - SDR 26
- Site Pipe - SDR 35
- Site Pipe - PVC Restrained Joint
- Site Pipe - Copper
- Site Pipe - HDPE Coiled
- Site Pipe - HDPE Rigid Smooth Interior
- Culvert - Corrugated Pipe
- Water Service Entrance
- Concrete Thrust Blocks
- Fire Hydrant
- Precast Structures
- Manholes & Pipe Boots
- Catch Basin & Pipe Hoods
- Septic System

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

The pipe sections are designed for budget takeoff by LF of pipe without consideration of the exact fittings. If you wish to have the site pipe takeoff with the exact fittings there is Site Utility database that is in development and will be available in the spring of 2012 for that purpose.

Site improvements

The Site Utilities section is further broken down into :

Chain Link Fence
Ornamental Metal Fence
Other Fencing
Site Landscape Walls
Relocate Trees & Shrubs
Asphalt Paving by Ton
Asphalt Paving by SY
Pavement Markings
Curbs
Pavement Misc

Each of these sections in turn has numerous conditions to use for takeoff. Click on the condition you want to use and perform the area, count, or linear function.

For example the Pavement Misc section looks as follows:

Posted Mike Ramsey - Jan 4, 2012 at 2:48 PM. This article has been viewed 1239 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2235

Section 08 Doors & Windows

Article Number: 2243 | Rating: Unrated | Last Updated: Jan 11, 2012 at 10:49 AM

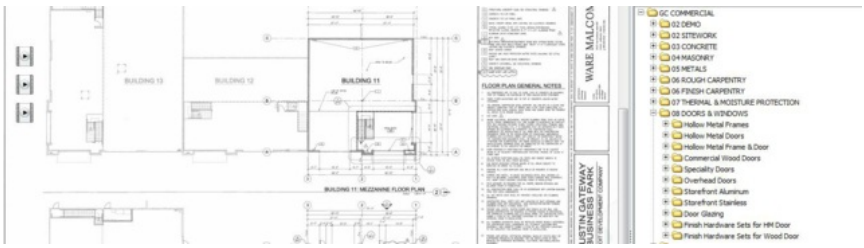
Section 08 Doors & Windows

The section for Doors & Windows is quick and easy database intended for swift takeoff of divisionb, Doors & Windows, for a general contractor. This section is based on the perspective of a commercial general contractor.

This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the door & window folders on the right side.

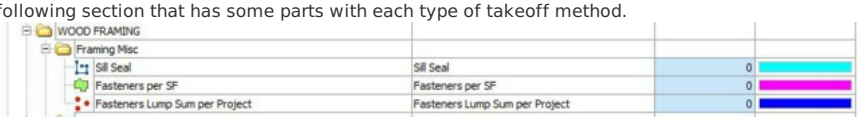


In this view the folder for Doors & Windows is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

Folders

The Doors & Windows section is sequenced into the following folders:
Hollow Metal Frames
Hollow Metal Doors
Hollow Metal Frame & Door
Commercial Wood doors
Specialty Doors
Overhead Doors
Storefront Aluminum

Storefront Stainless
Door Glazing
Finish Hardware Sets for HM Door
Finish Hardware Set for Wood Door

In turn each of these folders opens up additional folders, or conditions, for specific takeoff issues.

This is a screen shot of the two folders of this section.

Conditions

As you use each condition generally a properties box will pop up and may ask questions on dimensions or the specification of the condition.

Posted Mike Ramsey - Jan 11, 2012 at 10:49 AM. This article has been viewed 1235 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2243

Section 07 Thermal & Moisture Protection

Article Number: 2242 | Rating: Unrated | Last Updated: Jan 11, 2012 at 10:40 AM

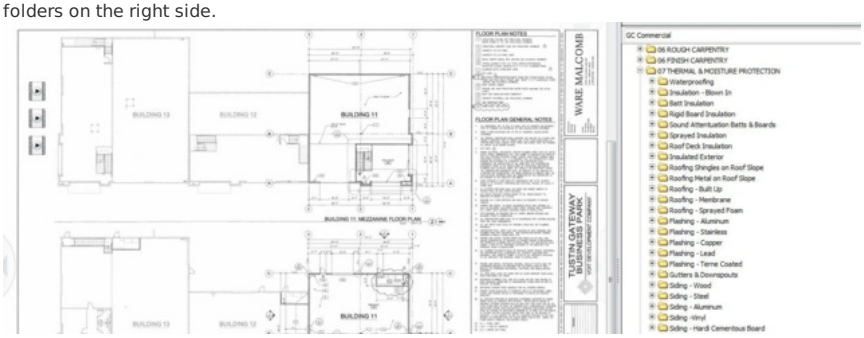
Section 07 Thermal & Moisture Protection

The section for Thermal & Moisture Protection is quick and easy database intended for swift takeoff of division 7 for a general contractor. This section is based on the perspective of a commercial general contractor, and is not intended for contractors in insulation or the roofing trades.

This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the thermal & moisture protection folders on the right side.

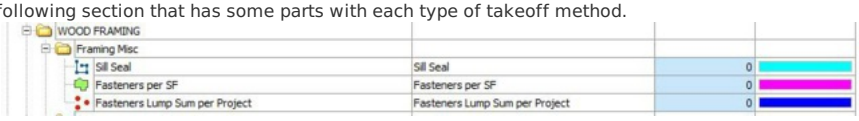


In this view the folder for Thermal & Moisture Protection is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

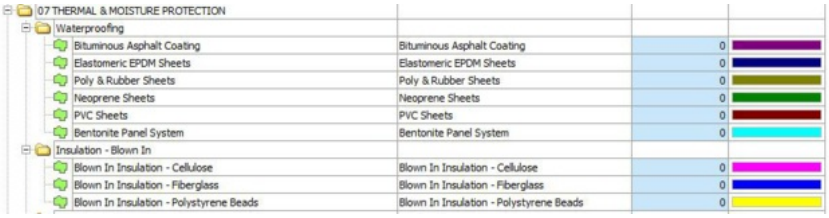
Folders

The Thermal & Moisture section is sequenced into the following folders:

- Waterproofing
- Insulation - Blown In
- Insulation - Batt
- Insulation - Rigid Board
- Insulation - Sprayed
- Sound Attenuation Batts & Boards
- Roof Deck Insulation
- Insulated Exterior EIFS
- Roofing - Shingles on Slope
- Roofing - Metal on Slope
- Roofing - Built Up
- Roofing - Membrane
- Roofing - Sprayed Foam
- Flashing - Aluminum
- Flashing - Stainless
- Flashing - Copper
- Flashing - Lead
- Flashing - Terne Coated
- Gutters & Downspouts
- Siding - Wood
- Siding - Steel
- Siding - Aluminum,
- Siding - Vinyl
- Siding - Hard Cement Board

In turn each of these folders opens up additional folders, or conditions, for specific takeoff issues.

This is a screen shot of the two folders of this section.



Posted Mike Ramsey - Jan 11, 2012 at 10:40 AM. This article has been viewed 1212 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2242

Section 15 Mechanical & Section 16 Electrical

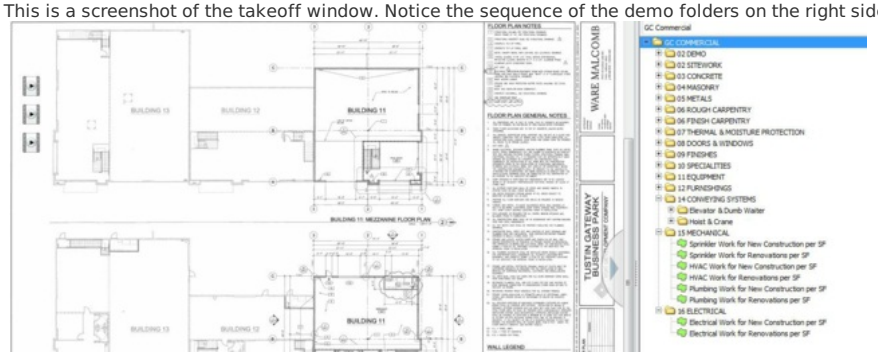
Article Number: 2249 | Rating: Unrated | Last Updated: Jan 11, 2012 at 11:36 AM

Section 15 Mechanical & Section 16 Electrical

The section for mechanical and electrical systems is a short, quick and easy database intended for swift takeoff for a general contractor. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.

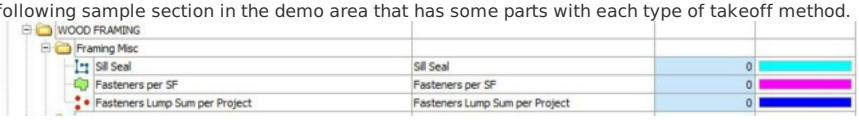


In this view the folders for conveying, mechanical and electrical is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following sample section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

15 & 16 Mechanical & Electrical

The Mechanical and Electrical sections are a simple section with takeoff and pricing by the SF of the construction area. Each type of work is set up as a SF cost for either new construction or for renovations.

Posted Mike Ramsey - Jan 11, 2012 at 11:36 AM. This article has been viewed 1183 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2249

Section 05 Metals

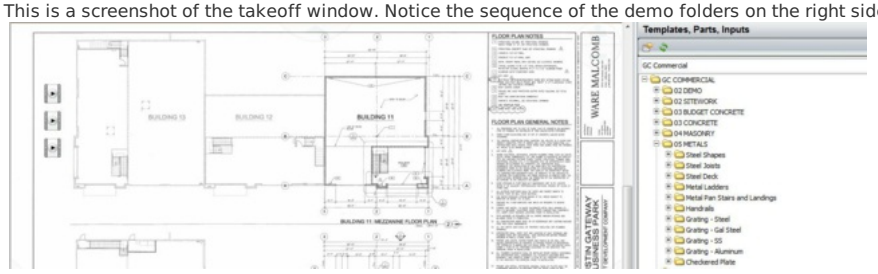
Article Number: 2240 | Rating: Unrated | Last Updated: Jan 11, 2012 at 10:18 AM

Section 05 Metals

The section for Metals is quick and easy database intended for swift takeoff of Metals for a general contractor. This section is not designed for a structural steel fabricator or erector. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.

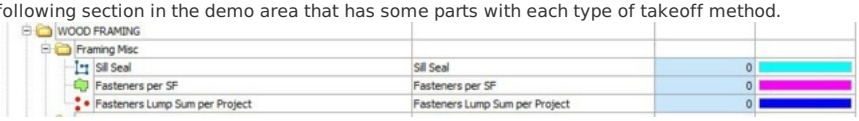


In this view the folder for Metals is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

05 Metals

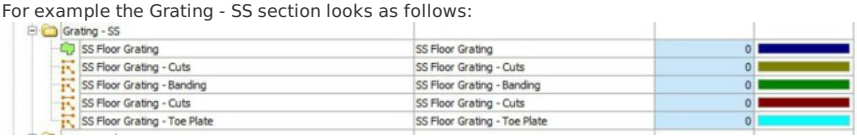
The Metals section is sequenced into :

- Steel Shapes
- Steel Joists
- Steel Deck
- Metal Ladders
- Metal Pan Stairs and Landings
- Handrails
- Grating - Steel
- Grating - Gal Steel
- Grating - Aluminum

Checkered Plate

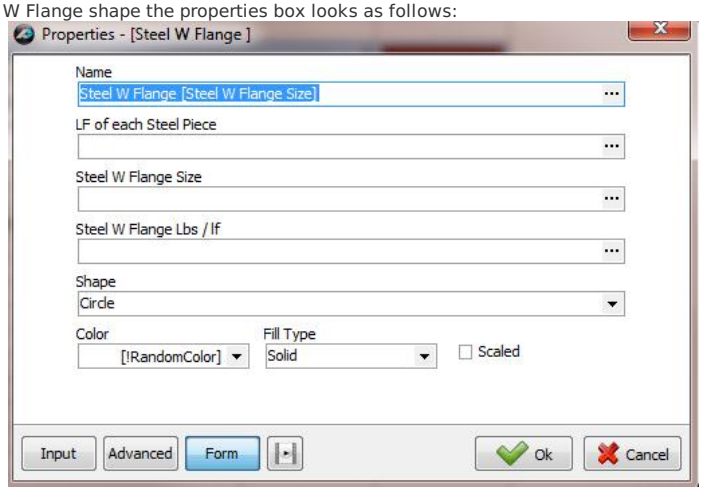
In turn each of these folders opens up for additional conditions for each section.

For example the Grating - SS section looks as follows:



Steel Shapes

For the steel shapes, and other types of metals, the properties box will have a series of values to fill out to complete the description and to determine the weight of the steel piece. For example with the steel W Flange shape the properties box looks as follows:



The LF of each steel piece is used for the weight calculation

The Steel W Flange Size is used to complete the name and description of the steel piece.

The Steel W Flange Lbs / lf is used in the weight calculation.

All he steel shapes have a similar type of properties box. You will also find a similar properties box for the joists and deck, but with different types of questions.

Posted Mike Ramsey - Jan 11, 2012 at 10:17 AM. This article has been viewed 1104 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2240

Section 04 Masonry

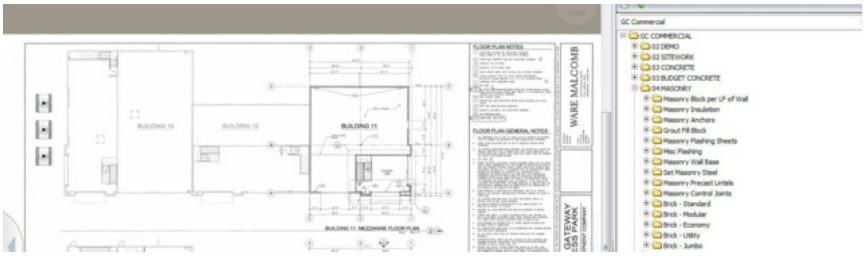
Article Number: 2237 | Rating: Unrated | Last Updated: Jan 4, 2012 at 3:33 PM

Section 04 Masonry

The section for masonry is quick and easy database intended for swift takeoff of masonry for a general contractor. This section is not designed for a masonry contractor. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the masonry folders on the right side.



In this view the folder for Masonry is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.

Notice the area, linear, and count designations for each condition.

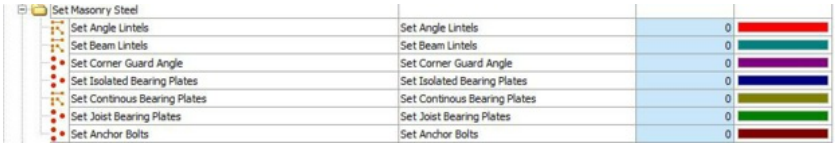
04 Masonry

The Masonry section is sequenced into :

- Masonry Block per LF or Wall
- Masonry Insulation
- Masonry Anchors
- Grout Fill Block
- Masonry Flashing Sheets
- Misc Flashing
- Masonry Wall Base
- Set Masonry Steel
- Masonry Precast Lintels
- Masonry Control Joints
- Brick - Standard
- Brick - Modular
- Brick - Economy
- Brick - Utility
- Brick - Jumbo

In turn each of these folders opens up for additional conditions for each section.

For example the Set Masonry Steel section looks as follows:



Posted Mike Ramsey - Jan 4, 2012 at 3:33 PM. This article has been viewed 1007 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2237

Section 10 Specialties

Article Number: 2245 | Rating: Unrated | Last Updated: Jan 11, 2012 at 11:06 AM

Section 10 Specialties

The section for specialties is quick and easy database intended for swift takeoff for a general contractor. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

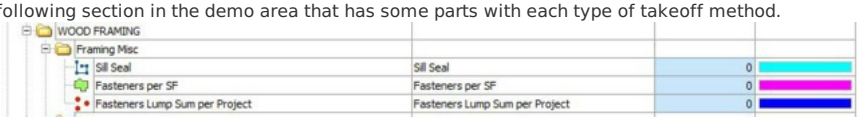
This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.

In this view the folder for Specialities is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

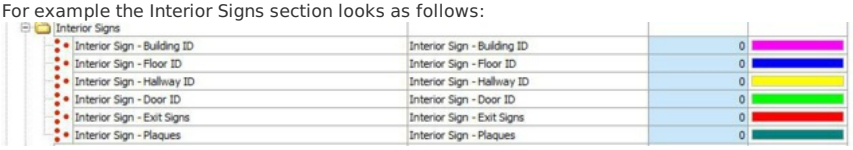
10 Specialties

The specialties section is sequenced into :

- Chalkboards & Marker boards
- Bulleting & Director Boards
- Toiler Partitions & Urinal Screens
- Shower Compartments
- Louvers
- Corner Guards
- Wall Guard & Bumpers
- Access Flooring
- Fireplaces
- Flagpoles
- Exterior Signs
- Interior Signs
- Turnstiles & Pedestrian Control
- Fire Cabinets
- Security Wall & Gates
- Demountable Partitions
- Folding Partitions
- Medical Curtain & Track
- Bath Accessories
- Grab Bars

In turn each of these folders opens up for additional conditions for each section.

For example the Interior Signs section looks as follows:



Posted Mike Ramsey - Jan 11, 2012 at 11:06 AM. This article has been viewed 933 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2245

Section 12 Furnishings

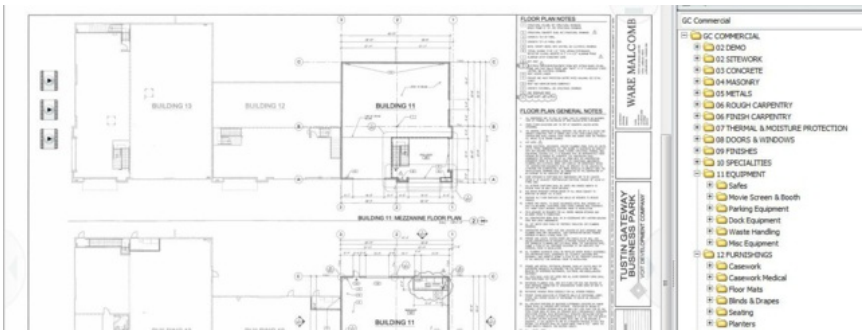
Article Number: 2247 | Rating: Unrated | Last Updated: Jan 11, 2012 at 11:18 AM

Section 12 Furnishings

The section for Furnishings is quick and easy database intended for swift takeoff for a general contractor. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.

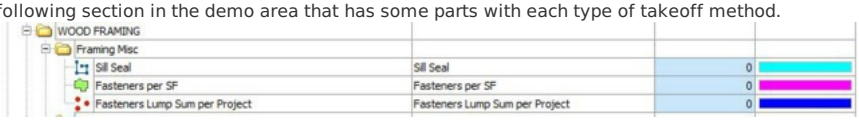


In this view the folders for Furnishings and furnishings is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

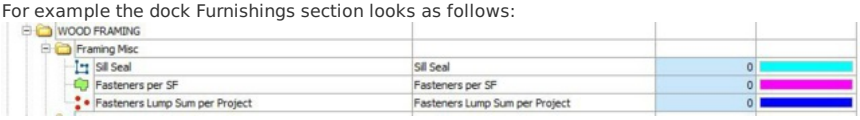
12 Furnishings

The Furnishings section is sequenced into :

- Casework
- Casework Medical
- Floor Mats
- Blinds & Drapes
- Seating
- Planters

In turn each of these folders opens up for additional conditions for each section.

For example the dock Furnishings section looks as follows:



Posted Mike Ramsey - Jan 11, 2012 at 11:18 AM. This article has been viewed 728 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2247

Section 11 Equipment

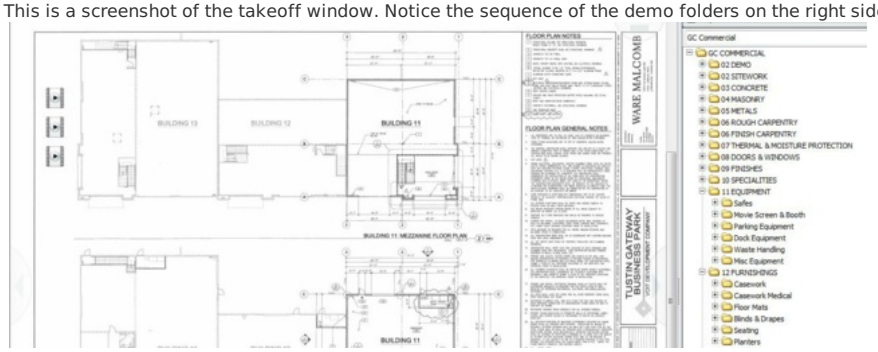
Article Number: 2246 | Rating: Unrated | Last Updated: Jan 11, 2012 at 11:11 AM

Section 11 Equipment

The section for equipment is quick and easy database intended for swift takeoff for a general contractor. This section is organized as a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.

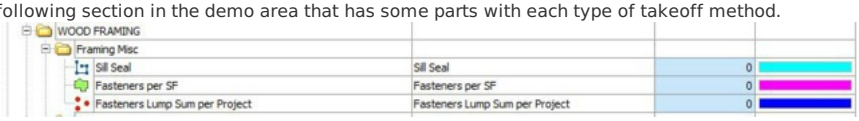


In this view the folders for equipment and furnishings is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following section in the demo area that has some parts with each type of takeoff method.



Notice the area, linear, and count designations for each condition.

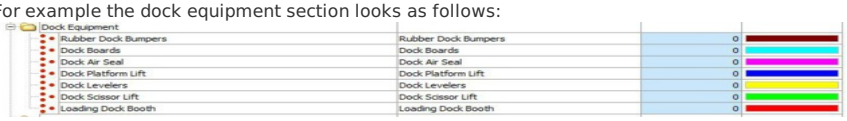
11 Equipment

The equipment section is sequenced into :

Safes
Movie Screen & Booth
Parking Equipment
Dock Equipment
Waste Handling

In turn each of these folders opens up for additional conditions for each section.

For example the dock equipment section looks as follows:



Posted Mike Ramsey - Jan 11, 2012 at 11:11 AM. This article has been viewed 636 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2246

Section 14 Conveying Systems

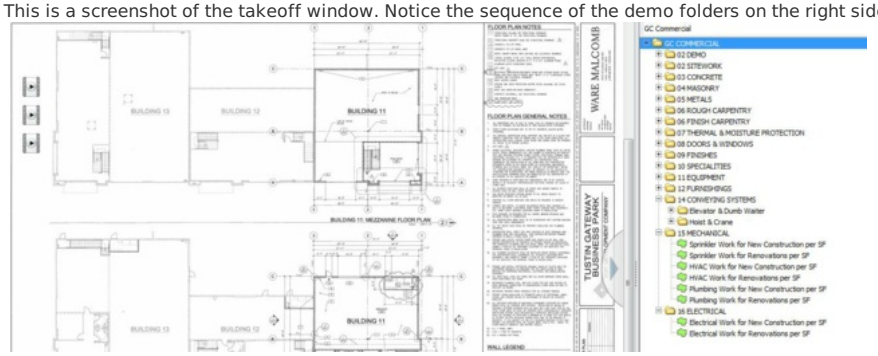
Article Number: 2248 | Rating: Unrated | Last Updated: Jan 11, 2012 at 11:31 AM

Section 14 Conveying Systems

The section for conveying systems is a short, quick and easy database intended for swift takeoff for a general contractor. This section is organized s a series of parts for count, area, or lineal takeoff.

Takeoff View:

This is a screenshot of the takeoff window. Notice the sequence of the demo folders on the right side.



In this view the folders for conveying, mechanical and electrical is opened up.

Takeoff

At this time the majority of the database is a template of parts. There are sections with assemblies and that will grow with the coming upgrade in spring and fall of 2012.

The parts are identified with the type of takeoff that is required for area, lineal feet, of count. Notice the following sample section in the demo area that has some parts with each type of takeoff method.

Notice the area, linear, and count designations for each condition.

14 Conveying Systems

The Furnishings section is sequenced into :
Elevator & Dumb Waiter
Hoist & Crane

In turn each of these folders opens up for additional conditions for each section.

Posted Mike Ramsey - Jan 11, 2012 at 11:31 AM. This article has been viewed 623 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2248

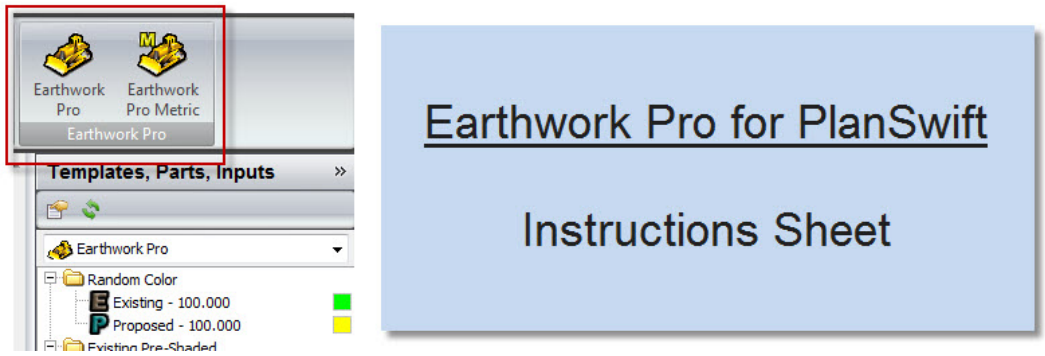
PlanSwift Certified Plugins

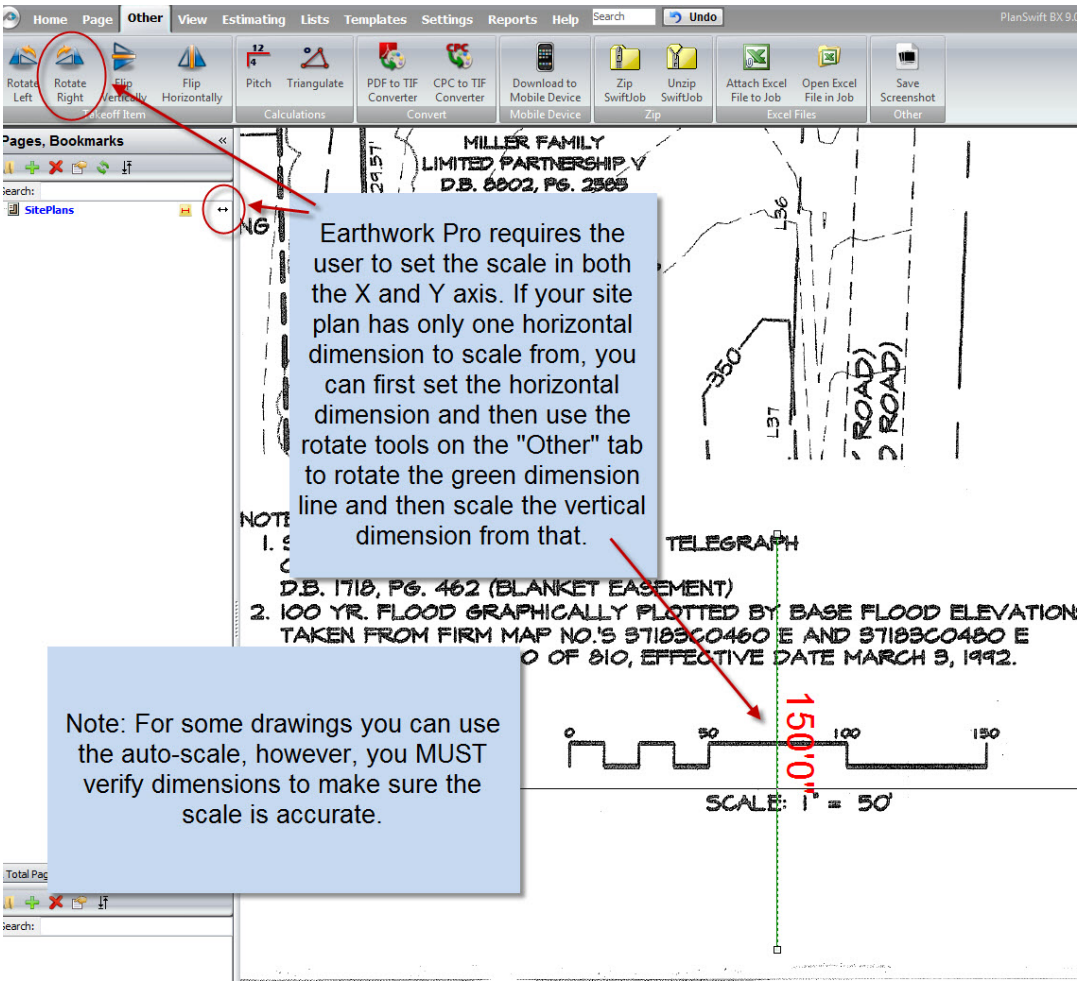
Earthwork Pro

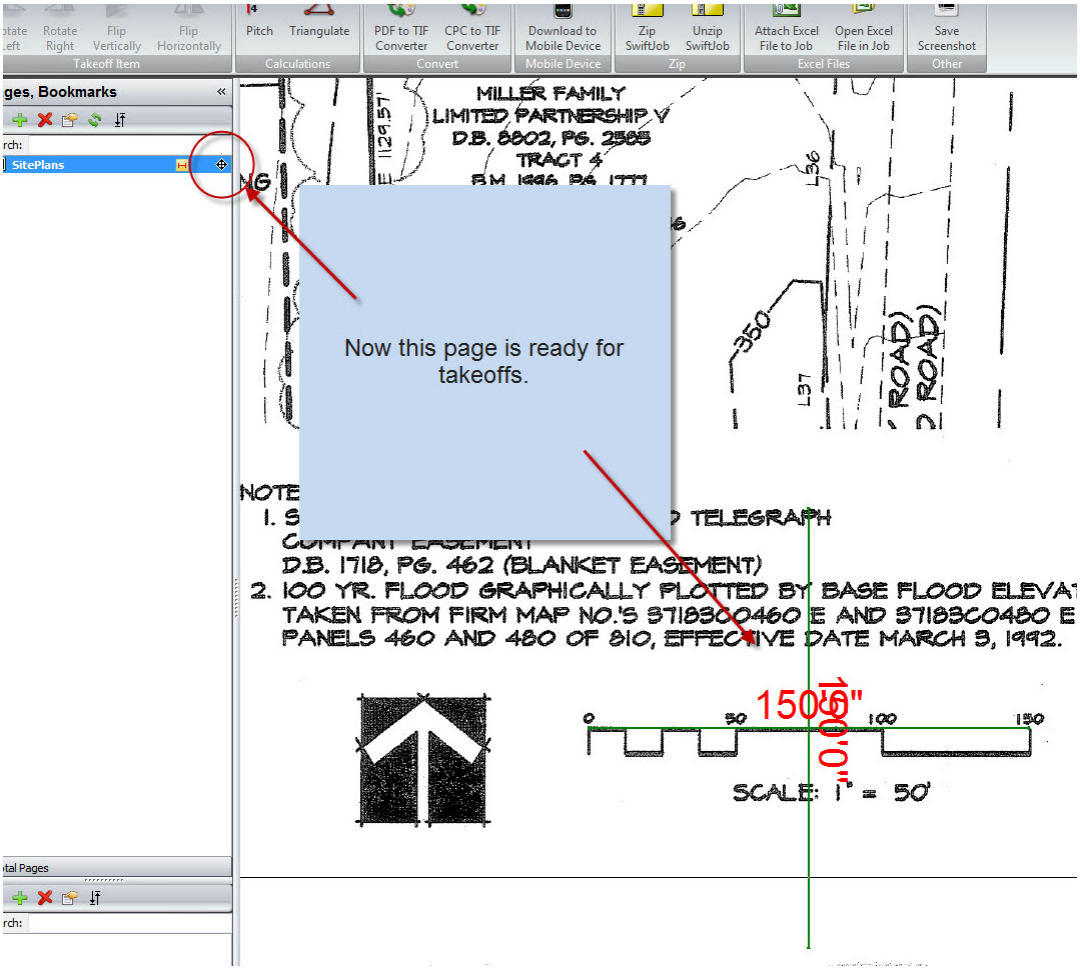
Article Number: 1795 | Rating: 4.6/5 from 5 votes | Last Updated: Dec 29, 2011 at 12:04 PM

Earthwork Pro is the fastest and easiest way to calculate cut and fill quantities in PlanSwift. Simply digitize all the existing contours and then digitize all proposed contours and then calculate! Very easy to use and powerfully accurate! This article contains the information necessary to use the features in the Earthwork Pro plugin.

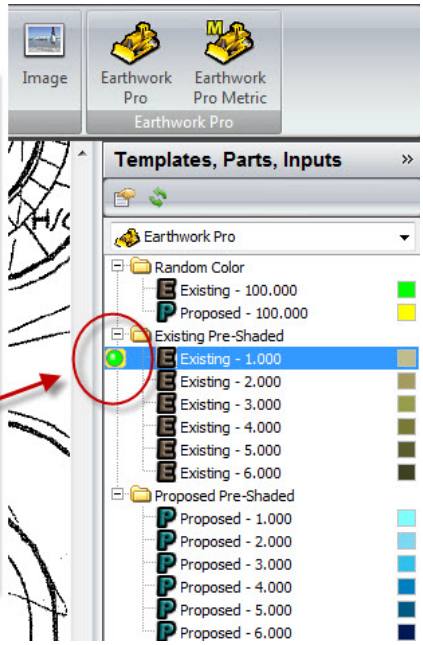
Watch Videos

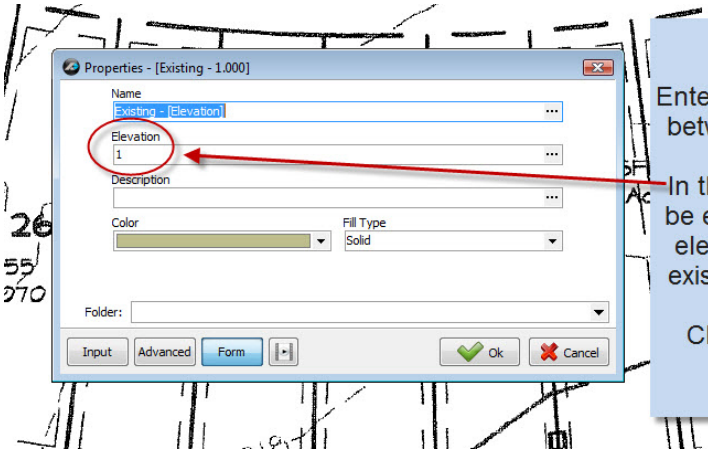



Home
Page
Other
View
Estimating
Lists
Templates
Settings
Reports
Help
Undo
Rotate Left
Rotate Right
Flip Vertically
Flip Horizontally
Pitch
Triangulate
PDF to TIF Converter
CPC to TIF Converter
Download to Mobile Device
Zip SwiftJob
Unzip SwiftJob
Attach Excel File to Job
Open Excel File in Job
Save Screenshot
Pages, Bookmarks
SitePlans
Earthwork Pro requires the user to set the scale in both the X and Y axis. If your site plan has only one horizontal dimension to scale from, you can first set the horizontal dimension and then use the rotate tools on the "Other" tab to rotate the green dimension line and then scale the vertical dimension from that.
Note: For some drawings you can use the auto-scale, however, you MUST verify dimensions to make sure the scale is accurate.
MILLER FAMILY
LIMITED PARTNERSHIP V
D.B. 8802, PG. 2505
TELEGRAPH
D.B. 1718, PG. 462 (BLANKET EASEMENT)
2. 100 YR. FLOOD GRAPHICALLY PLOTTED BY BASE FLOOD ELEVATION
TAKEN FROM FIRM MAP NO.'S 37183C0460 E AND 37183C0480 E
150'-0"
SCALE: 1" = 50'



From the Templates, Parts, Inputs on the right side of PlanSwift, select one of the Existing templates. You can choose a random color or a pre-shaded color. Click the green button.

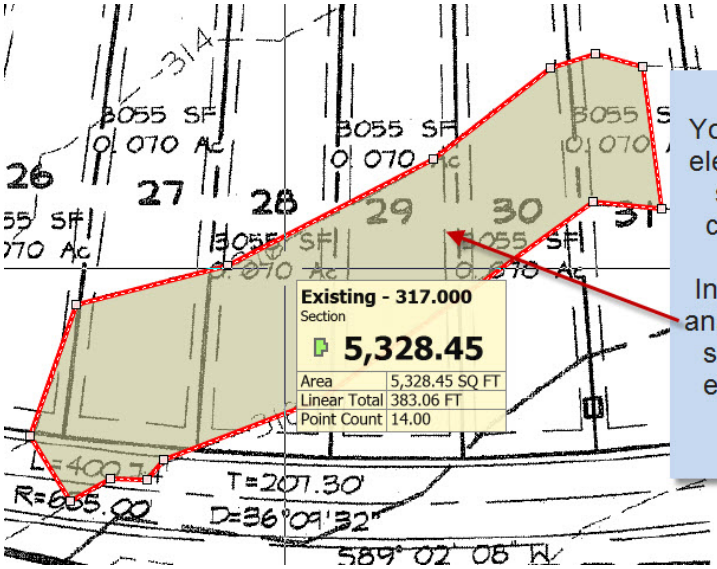




Enter in the elevation of the area between two existing contours.

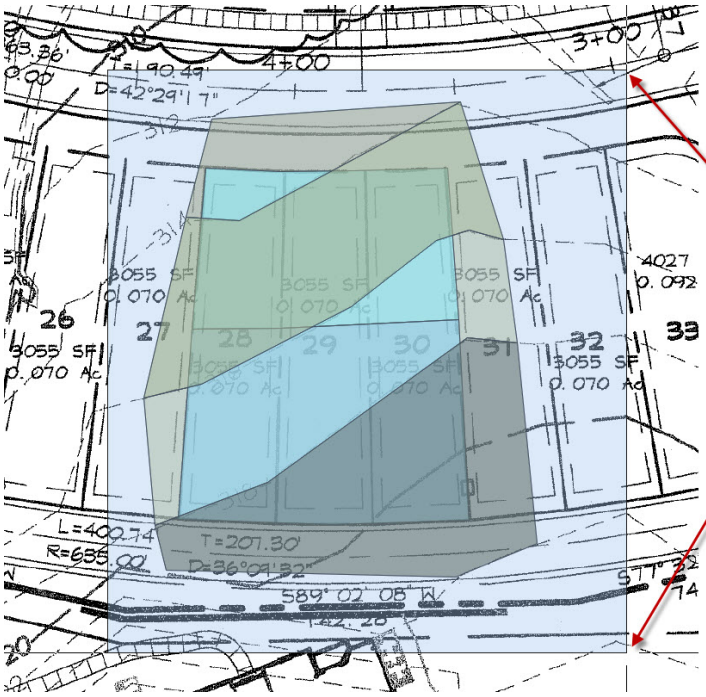
In this example we are going to be entering 317 as the average elevation of the area between existing contours 316 and 318.

Click Ok to begin digitizing.



You can digitize the area for elevation 317 over the entire site or you can just do a certain section of the site.

In this example we are only analyzing Lots 28, 29 and 30 so we only need to do the existing area across those lots.



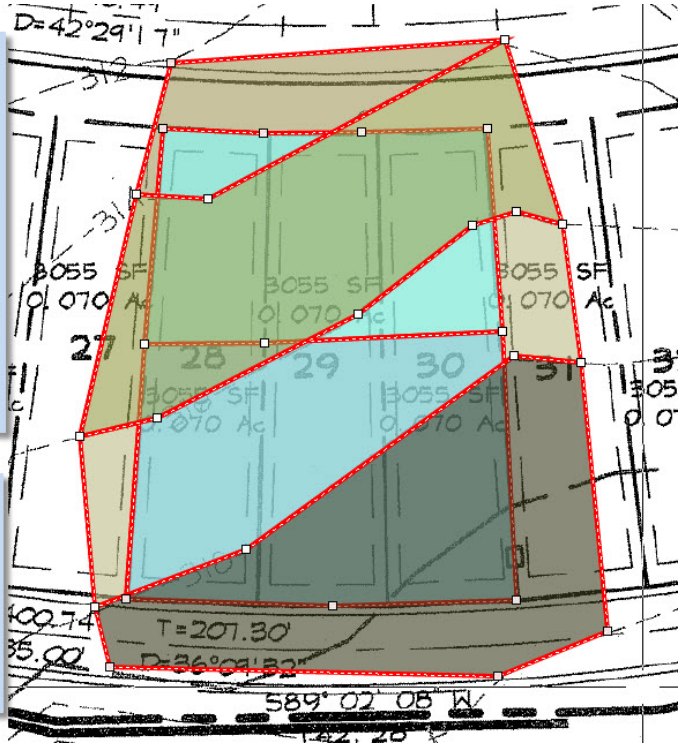
Now take your mouse, left click to drag and draw a box over all of the contours both existing and proposed.

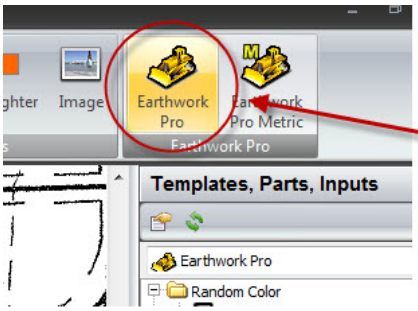
All of the existing and proposed areas will now be selected.

They will all be highlighted in red and you will see all of the points.

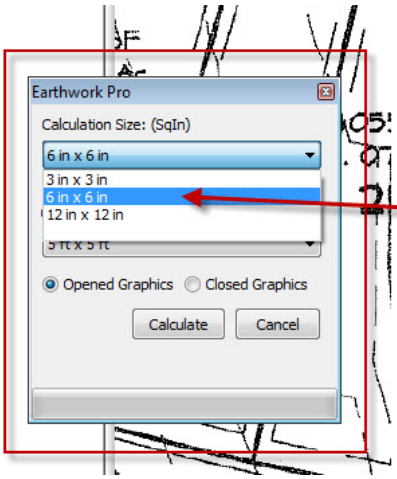
It is important that ALL of the areas are selected. Anything not included in the selection will not be analyzed.

Note: If other digitized items on the same page are also selected it will not affect the Earthwork Pro calculations, however it is recommended that those other items be hidden and not selected.





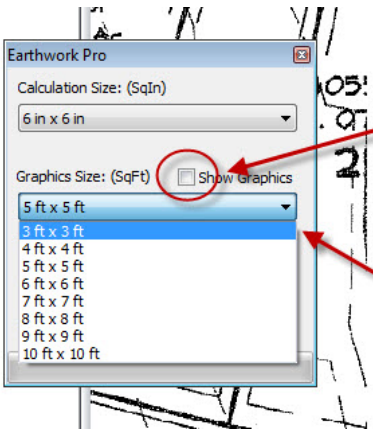
Click the Earthwork Pro button on the toolbar to open the plugin.



Earthwork Pro will open.

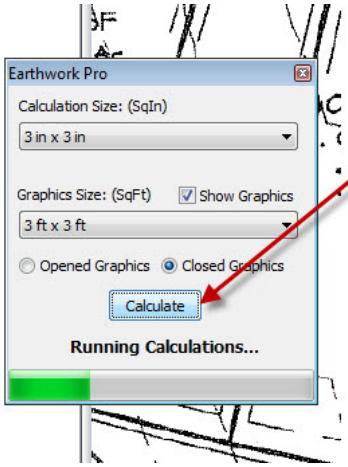
You can set your calculation size from 3x3 6x6 or 12x12 square inches.

This is the actual size of area that will be analyzed on each calculation.


Earthwork Pro
Calculation Size: (SqIn)
6 in x 6 in
Graphics Size: (SqFt)
Show Graphics
5 ft x 5 ft
3 ft x 3 ft
4 ft x 4 ft
5 ft x 5 ft
6 ft x 6 ft
7 ft x 7 ft
8 ft x 8 ft
9 ft x 9 ft
10 ft x 10 ft

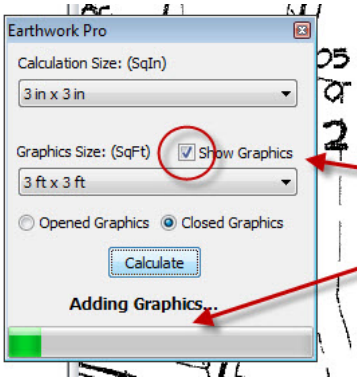
You can also select to show the graphics and choose the size of the graphics.

Note: The graphics size DOES NOT affect the calculations. PlanSwift requires way too much random access memory or RAM to do a smaller grid than 3ft x 3ft. This is the smallest option for the graphics.

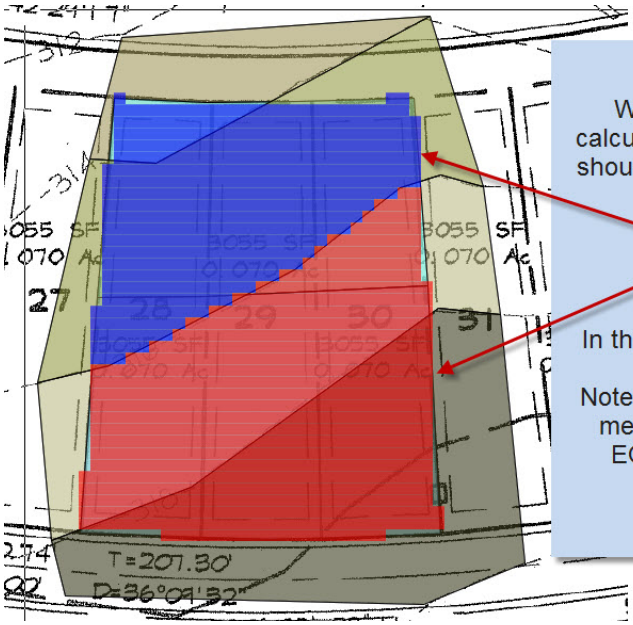


Click the Calculate button to begin running the calculations.

In this example the calculations are be analyzed on a 3in x 3in grid and the graphics will be added on a 3ft x 3ft grid.



If you checked the box to Show Graphics it will also add the graphics and give the progress.



When Earthwork Pro has finished calculating and adding the graphics you should see a blue and red shaded area.

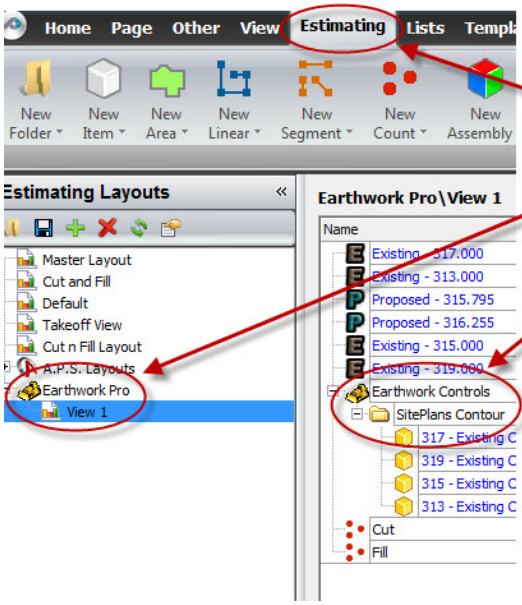
The blue is the areas for fills.

The red is the areas for cuts.

In this example we used a 3ft x 3ft grid.

Note: Any areas not shaded red or blue mean that the existing elevation was EQUAL to the proposed elevation.

You can also turn off all the existing and proposed areas to show just the graphics for the cuts and fills only.



To view the calculations simply go to the Estimating tab.

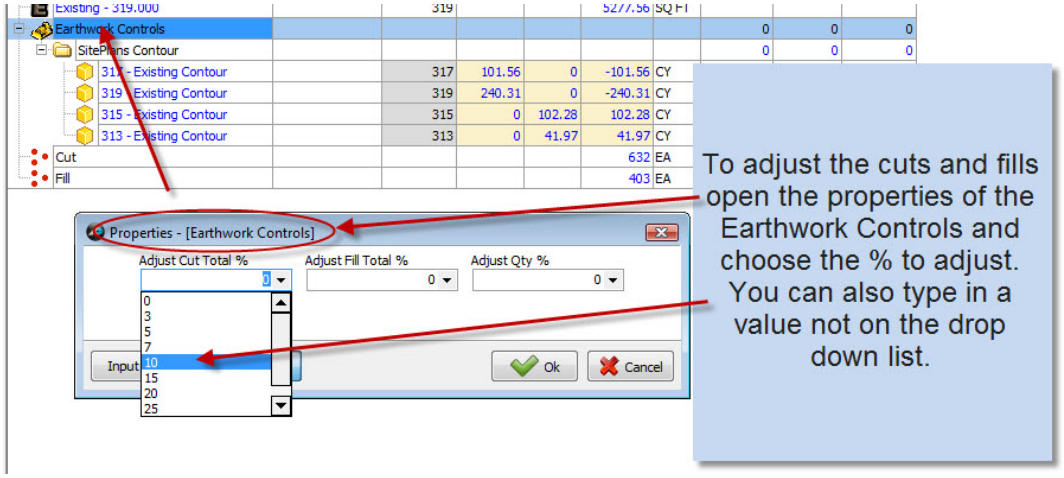
Click on the Earthwork Pro layouts.

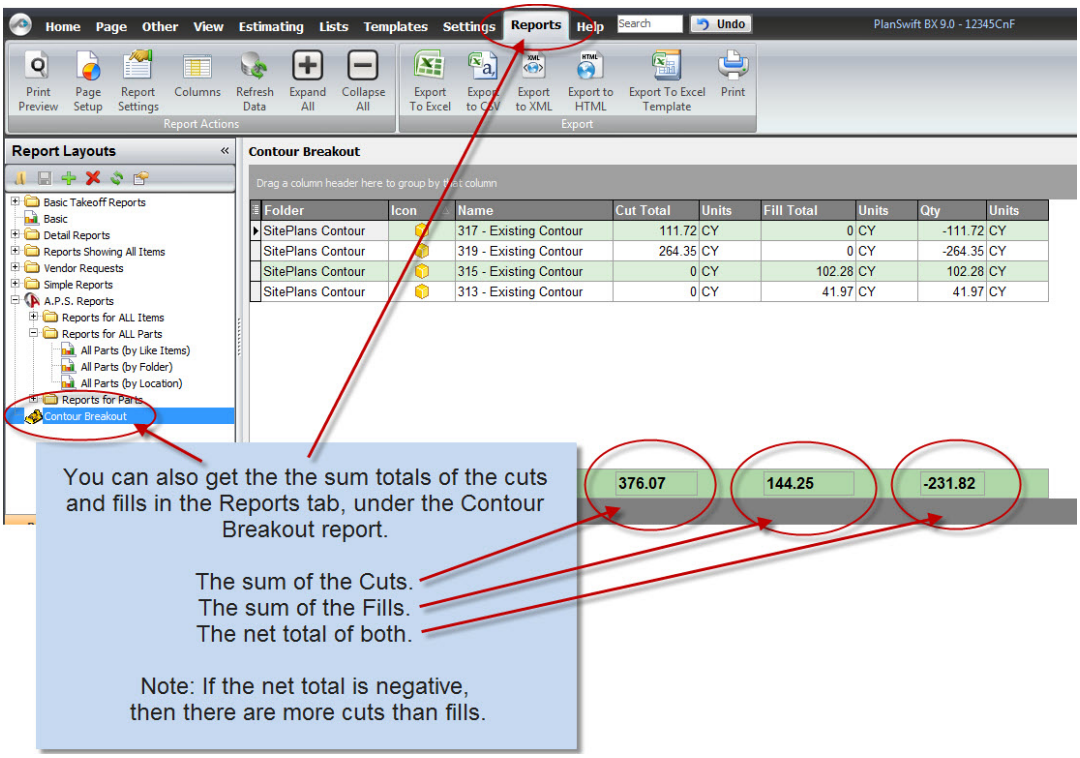
You will need to expand the Earthwork Controls and also the folder below that. (the folder will be named the same as the page you did the takeoffs on.)

Each Existing Contour will be listed with its cuts and fills.

Name	Description	Elevation	Cut Total	Fill Total	Qty	Units	Adjust C...	Adjust F...	Adjust Q...
Existing - 317.000		317			4296.32	SQ FT			
Existing - 313.000		313			1536.06	SQ FT			
Proposed - 315.795		315.795			3913.02	SQ FT			
Proposed - 316.255		316.255			5425.16	SQ FT			
Existing - 315.000		315			4520.52	SQ FT			
Existing - 319.000		319			5277.56	SQ FT			
Earthwork Controls							0	0	0
SitePlans Contour							0	0	0
317 - Existing Contour		317	101.56	0	-101.56	CY	0	0	0
319 - Existing Contour		319	240.31	0	-240.31	CY	0	0	0
315 - Existing Contour		315	0	102.28	102.28	CY	0	0	0
313 - Existing Contour		313	0	41.97	41.97	CY	0	0	0
Cut					632	EA			
Fill					403	EA			

This layout will give a summary of the cut totals, fill totals and the Qty total (the net total). You can also adjust the cuts and fills with a percentage.


Earthwork Controls
SitePlans Contour
317 - Existing Contour
319 - Existing Contour
315 - Existing Contour
313 - Existing Contour
Cut
Fill
Properties - [Earthwork Controls]
Adjust Cut Total %
Adjust Fill Total %
Adjust Qty %
Input
Ok
Cancel
To adjust the cuts and fills open the properties of the Earthwork Controls and choose the % to adjust. You can also type in a value not on the drop down list.



Demo Video

Instructional Video

Author: **Advanced Software Workshop, LLC**
Contact Name: **Aaron Watts**
Email: **aaron@planswift.com**
Phone: **(888)752-6794 ext 708**

Posted Mike Ramsey - Jul 14, 2011 at 3:57 PM. This article has been viewed 8677 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1795

Excel Import Tool

Article Number: 2232 | Rating: 5/5 from 1 votes | Last Updated: Dec 29, 2011 at 12:15 PM

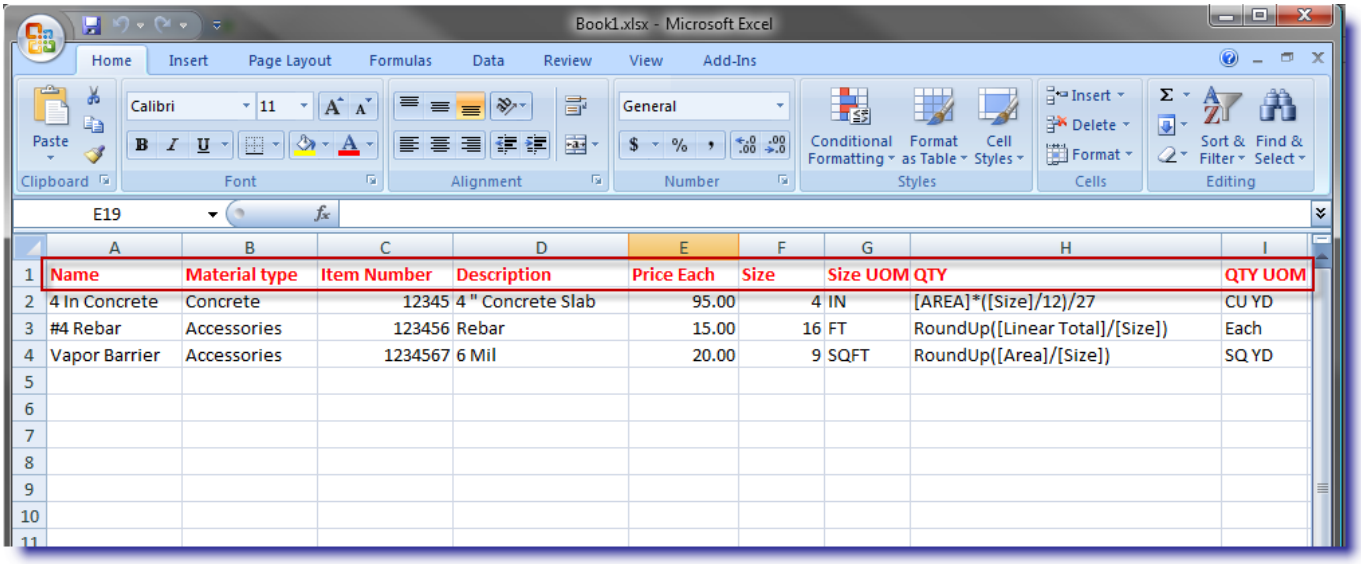
The Excel Import Tool is a plugin that was designed to allow users to create PlanSwift parts from their own Excel spreadsheets. This article will describe in detail how to use this tool. The video is at the end.

MS Excel 2003 or later
Difficulty - Easy

Ok let's get our Excel spreadsheet together and prepare it for the import process into PlanSwift. First here are a few things to consider before importing. Also keep in mind that this is a basic example and you are not limited to the properties listed.

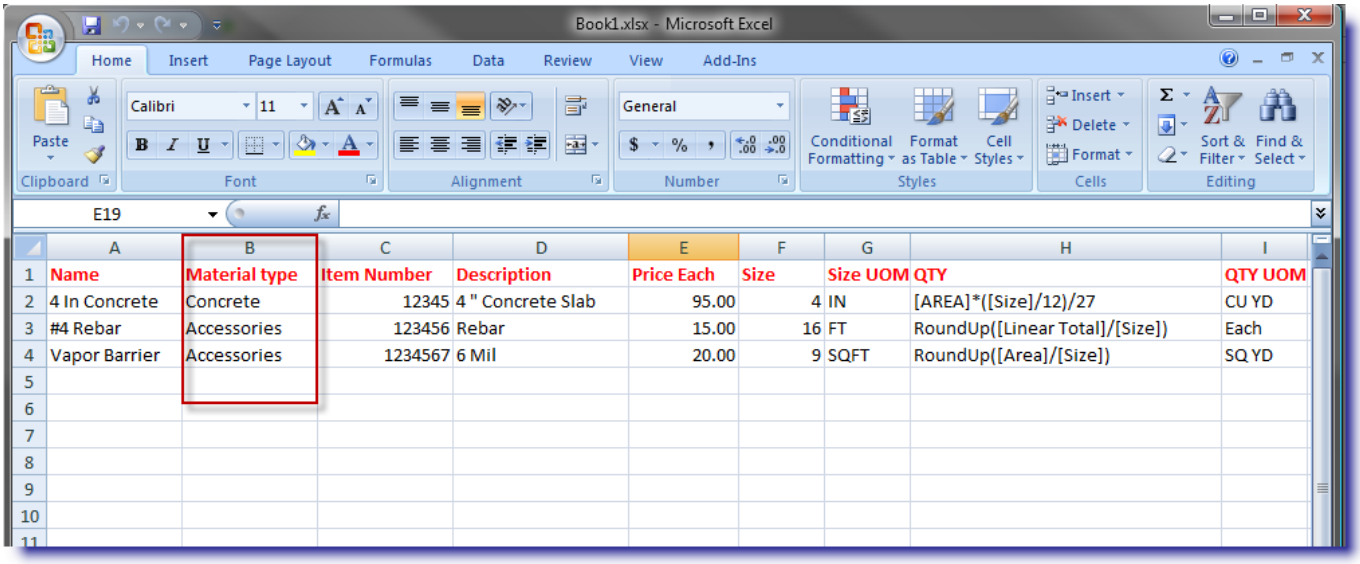
1. Plan out what properties you want to add and populate for each item.
2. Try to be as global as you can with your properties because each column you create will be added as a property on each item you are importing weather it is used by the item or not.
3. To simplify the cleanup work after the import you can also import the calculations for any given property. *Note that the formula needs to be written in the same manor as it is in PlanSwift and NOT Excel.*

The first row of your spread sheet should contain the property headings. You will have the opportunity to edit the names that appear in PlanSwift when you run the import tool.



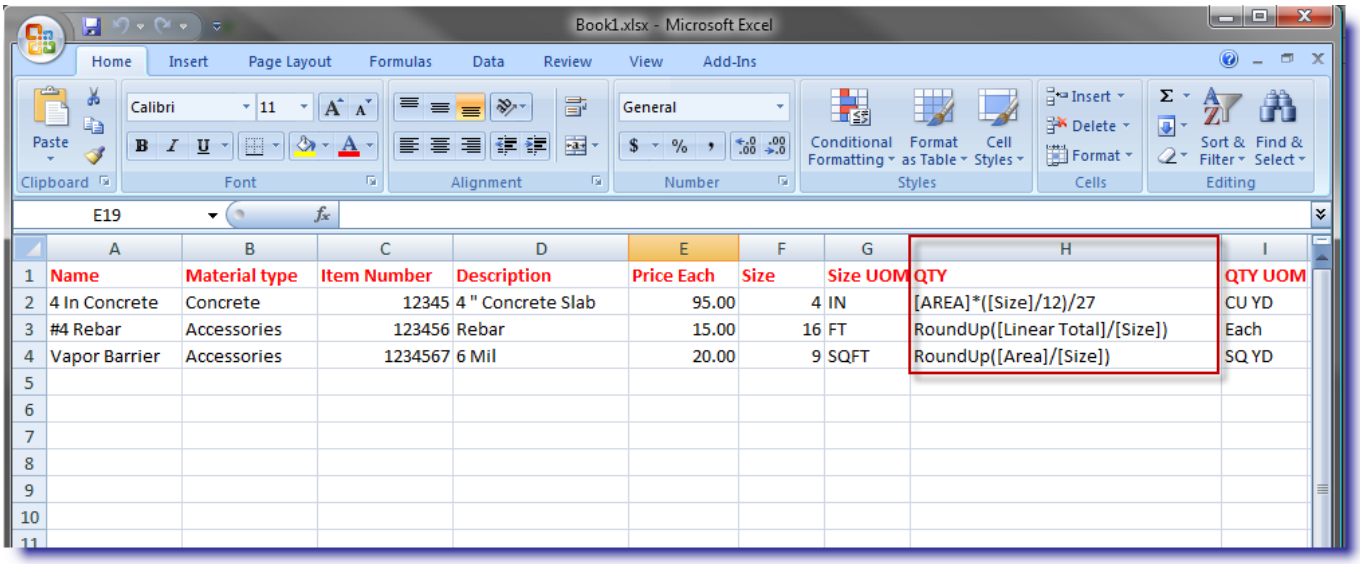
	A	B	C	D	E	F	G	H	I
1	Name	Material type	Item Number	Description	Price Each	Size	Size UOM	QTY	QTY UOM
2	4 In Concrete	Concrete	12345	4 " Concrete Slab	95.00	4	IN	[AREA]*([Size]/12)/27	CU YD
3	#4 Rebar	Accessories	123456	Rebar	15.00	16	FT	RoundUp([Linear Total]/[Size])	Each
4	Vapor Barrier	Accessories	1234567	6 Mil	20.00	9	SQFT	RoundUp([Area]/[Size])	SQ YD
5									
6									
7									
8									
9									
10									
11									

This next image shows what I called Material Type. The name itself really is not important here but what I am going to create with this column is a folder structure for my Tab in PlanSwift. This will keep all of my items sorted into nice tidy categories. One thing to note here is that you will need to be sure to sort your spreadsheet by this column before importing otherwise you will end up with a duplicate folder.



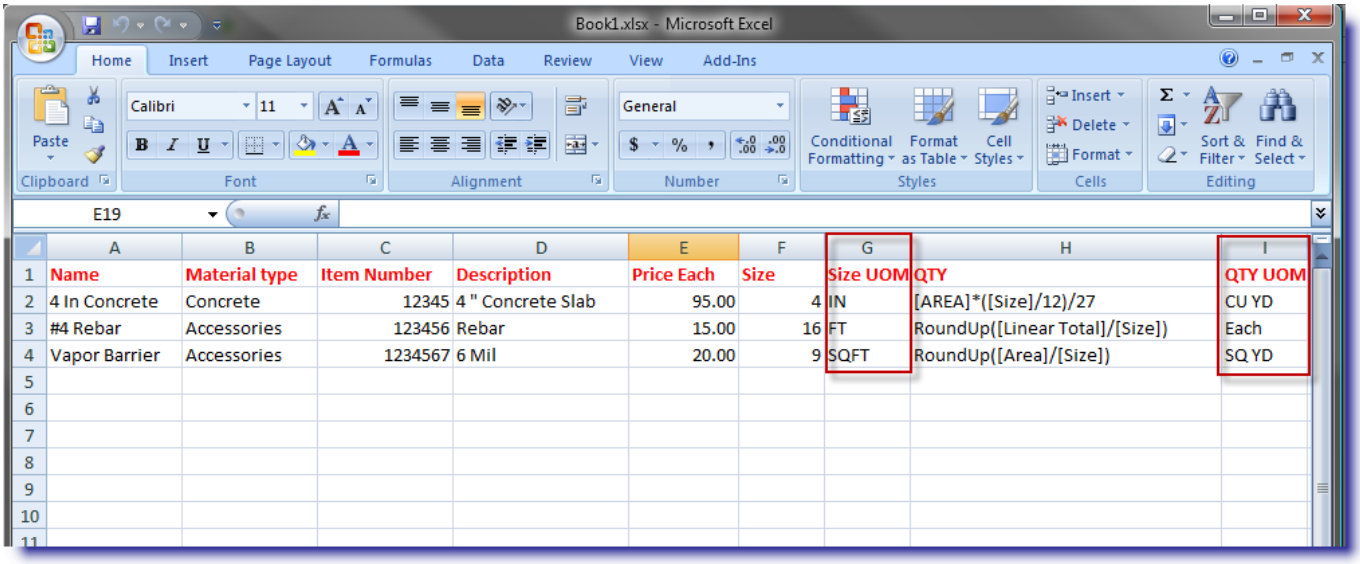
	A	B	C	D	E	F	G	H	I
1	Name	Material type	Item Number	Description	Price Each	Size	Size UOM	QTY	QTY UOM
2	4 In Concrete	Concrete	12345	4 " Concrete Slab	95.00	4	IN	[AREA]*([Size]/12)/27	CU YD
3	#4 Rebar	Accessories	123456	Rebar	15.00	16	FT	RoundUp([Linear Total]/[Size])	Each
4	Vapor Barrier	Accessories	1234567	6 Mil	20.00	9	SQFT	RoundUp([Area]/[Size])	SQ YD

In the QTY property I have added my PlanSwift formula to perform the calculations needed to get the result for the part being counted. You are not limited to the QTY property for this. You may be adding other calculations in the properties you are creating. You do not have to enter formulas here but it saves a great deal of time if you have a lot of items.



	A	B	C	D	E	F	G	H	I
1	Name	Material type	Item Number	Description	Price Each	Size	Size UOM	QTY	QTY UOM
2	4 In Concrete	Concrete	12345	4 " Concrete Slab	95.00	4	IN	[AREA]*([Size]/12)/27	CU YD
3	#4 Rebar	Accessories	123456	Rebar	15.00	16	FT	RoundUp([Linear Total]/[Size])	Each
4	Vapor Barrier	Accessories	1234567	6 Mil	20.00	9	SQFT	RoundUp([Area]/[Size])	SQ YD

You can also add a column for the unit of measure simillar to what i have shown here. We will specify which fields are Units during the import process.

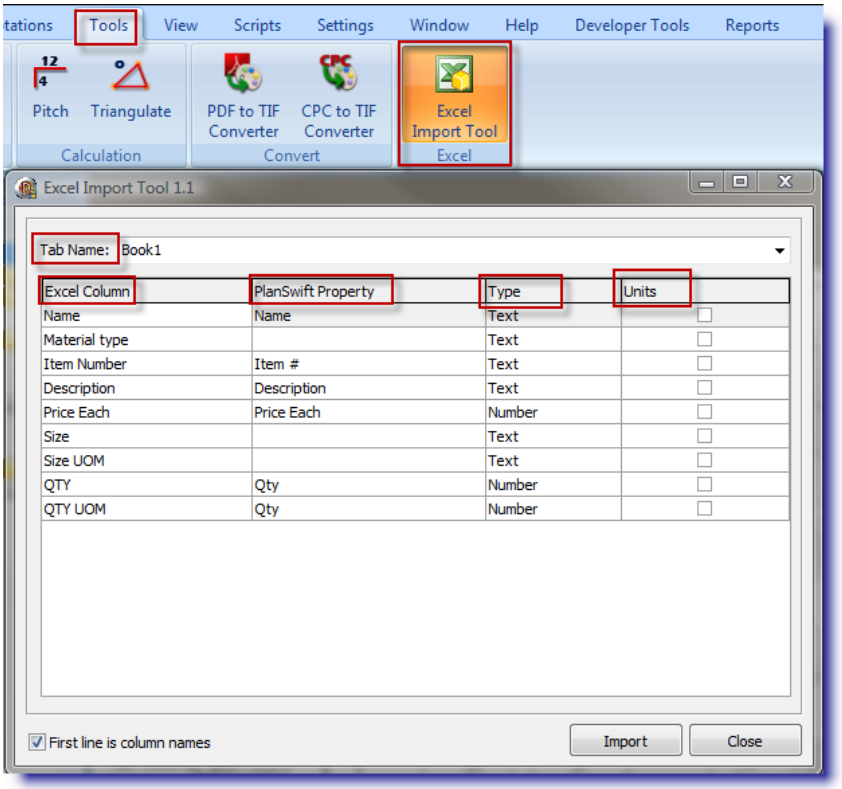


	A	B	C	D	E	F	G	H	I
1	Name	Material type	Item Number	Description	Price Each	Size	Size UOM	QTY	QTY UOM
2	4 In Concrete	Concrete	12345	4 " Concrete Slab	95.00	4	IN	[AREA]*([Size]/12)/27	CU YD
3	#4 Rebar	Accessories	123456	Rebar	15.00	16	FT	RoundUp([Linear Total]/[Size])	Each
4	Vapor Barrier	Accessories	1234567	6 Mil	20.00	9	SQFT	RoundUp([Area]/[Size])	SQ YD

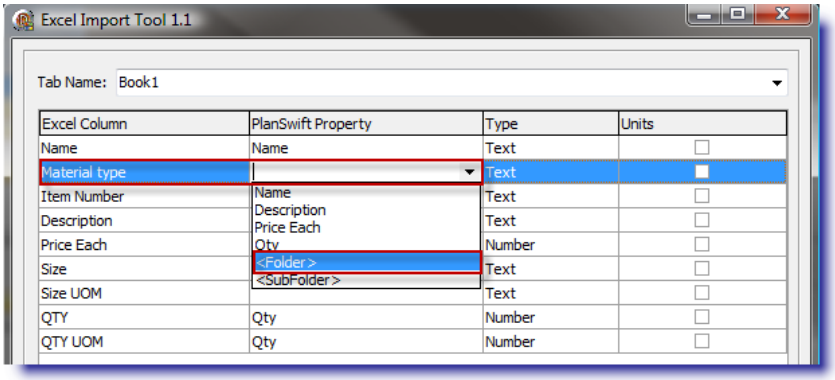
Once you have your spreadsheet formatted the way you want with all of the data complete you are ready to start the import process. With your Excel spreadsheet open and PlanSwift open go to the Tools tab in PlanSwift and click on the Excel Import Tool button. This will launch the tool and open it in a

new window. Your Excel sheet will load the column headers automatically. PlanSwift will automatically associate column names with default PlanSwift properties if the names are the same. About the form:

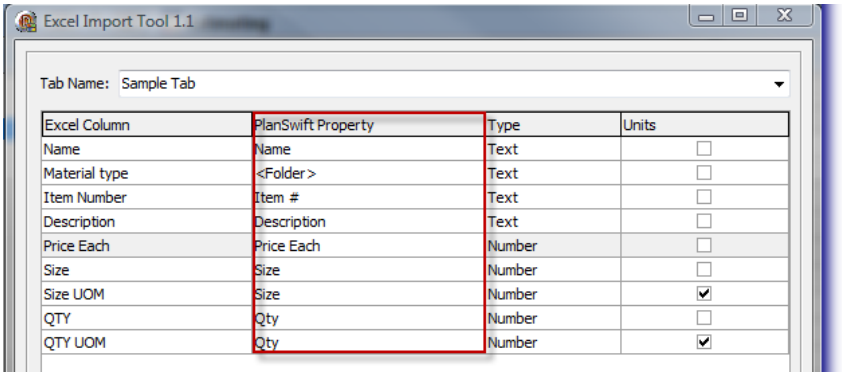
1. Tab Name - by default the tab name is set to the name of the Excel file. You can change this here if you like.
2. Excel Column - These are your headings from your Excel sheet.
3. PlanSwift Property - These are the properties names that are matched to or created in PlanSwift.
4. Type - This is where you will select weather it is a text or number result type.
5. Units - This is were you can specify weather a column is a unit of measure.



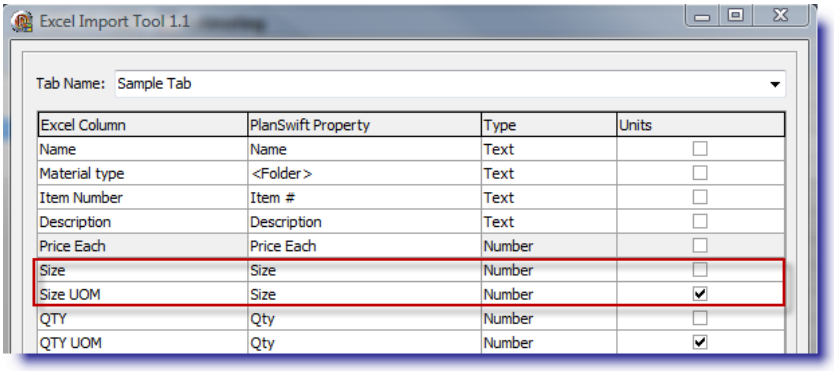
Let's start by editing the PlanSwift property names. The first property is Name which matches to the name property in PlanSwift which is what I want so I will leave it alone. The second property I have is Material Type and since there is not a property in PlanSwift that does not match I will need to select one from the list or create one by typing the name I want to use. Now earlier I mentioned that I wanted to have an organized structure for my parts using the Material Type as the group. From the drop down menu I am going to select the <Folder> option. this will tell PlanSwift that I want a folder created for this name in the spreadsheet.



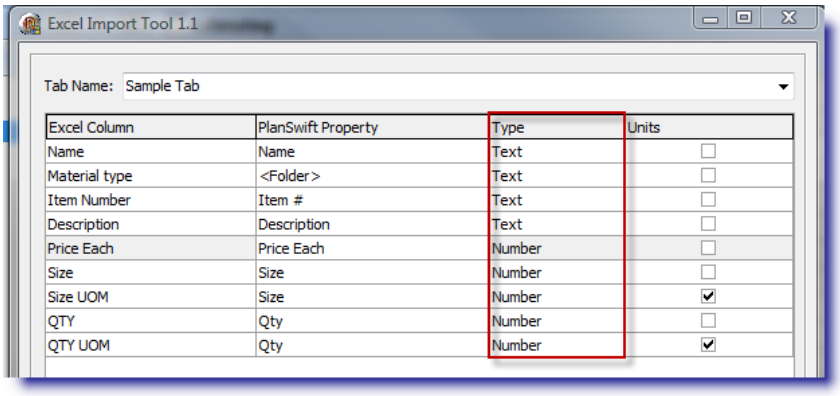
Continue this process for all of the PlanSwift Property Names.



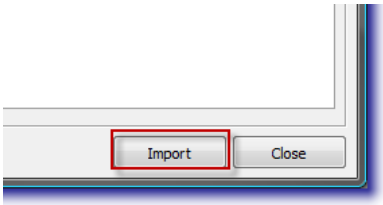
Take note that when you get to the Size and QTY properties I have assigned multiple Excel columns to a single PlanSwift property. This is when you are specifying a UOM for a specific property. In the example below you see that I have Size and Size UOM matched to the same Size property in PlanSwift the difference is that you will check the Units check box. This designates that the Excel Column contains the UOM for the given property.


Excel Import Tool 1.1
Tab Name: Sample Tab
Excel Column | PlanSwift Property | Type | Units
Name | Name | Text
Material type | <Folder> | Text
Item Number | Item # | Text
Description | Description | Text
Price Each | Price Each | Number
Size | Size | Number
Size UOM | Size | Number
QTY | Qty | Number
QTY UOM | Qty | Number

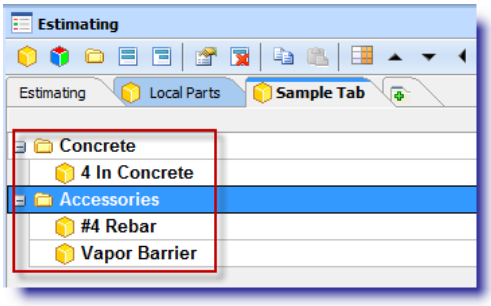
Make sure that you adjust your property Type to reflect the desired result in PlanSwift.


Excel Import Tool 1.1
Tab Name: Sample Tab
Excel Column | PlanSwift Property | Type | Units
Name | Name | Text
Material type | <Folder> | Text
Item Number | Item # | Text
Description | Description | Text
Price Each | Price Each | Number
Size | Size | Number
Size UOM | Size | Number
QTY | Qty | Number
QTY UOM | Qty | Number

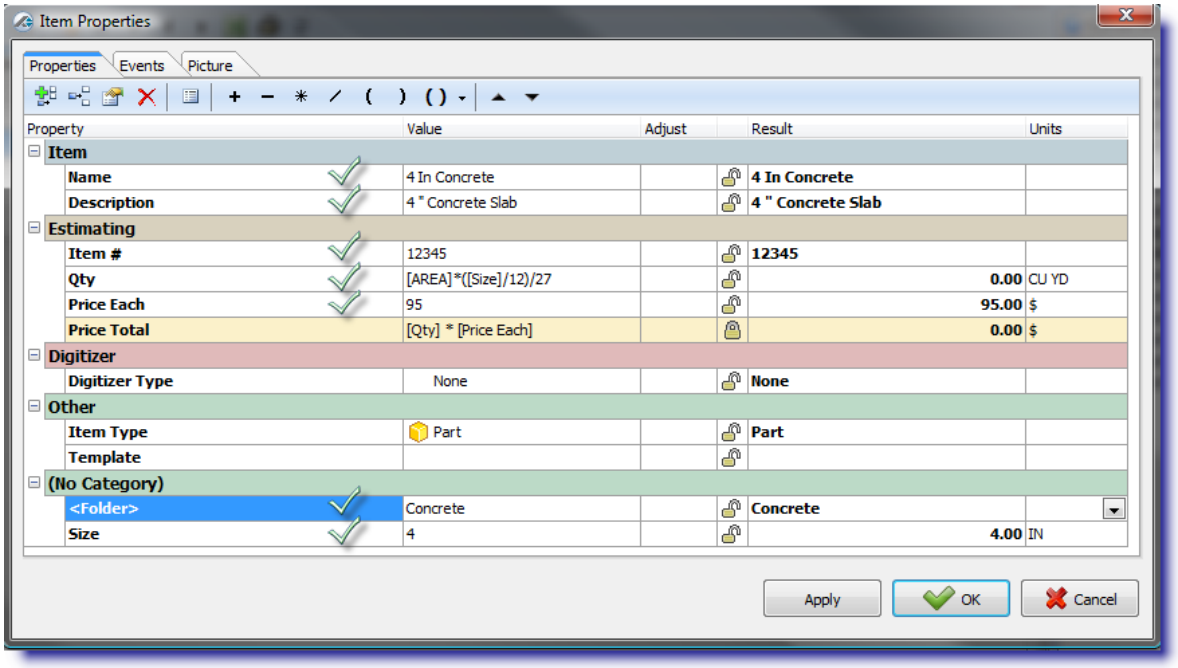
Once everything is set the way you want it click on the Import button in the lower right corner.



Once the import tool has finished you should see the tab showing in the PlanSwift estimating window. Notice how the folder structure worked here.



Now let's take a look at one of the items to make sure all of the information loaded properly. Here you can see the Name, description, Item Number, the formula in QTY, the Price, Size and Folder all populated as it was laid out in the Excel spreadsheet.



Tutorial Video

Posted Mike Ramsey - Dec 29, 2011 at 12:15 PM. This article has been viewed 3874 times.

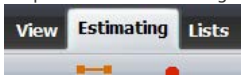
Online URL: http://www.planswift.com/phpkb/article.php?id=2232

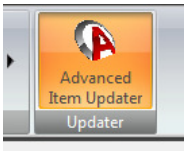
Advanced Item Updater

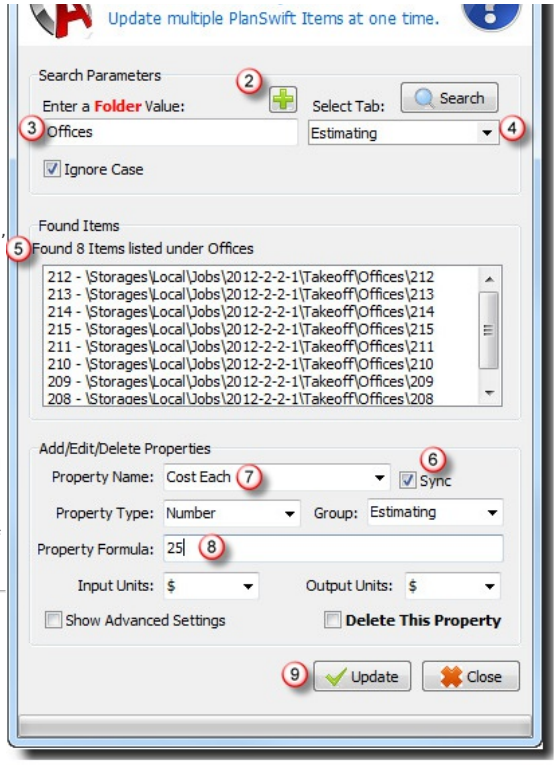
Article Number: 2253 | Rating: 4/5 from 3 votes | Last Updated: Mar 7, 2012 at 5:55 PM

Advanced Item Updater - Quick Start Guide

Step 1. On the Estimating Tab click the Advanced Item Updater button.







Step 2. Choose a property to search.
Step 3. Enter a value to search.
Step 4. Choose a Tab to search for items, then click 'Search'.
Step 5. Review the items found.
Step 6. Check the box to Sync the items' properties.
Step 7. Choose the property to update.
Step 8. Enter the new value here.
Step 9. Click Update.

Note: Unless you are an advanced user ***DO NOT*** make changes to the darkened fields on this form.
Note: If you want to undo the changes you made, just click **UNDO** at the top of PlanSwift.

Posted Mike Ramsey - Mar 7, 2012 at 5:55 PM. This article has been viewed 2062 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2253

Advance Copy Pro

Article Number: 2228 | Rating: 1/5 from 1 votes | Last Updated: Dec 29, 2011 at 10:37 AM

Advance Copy Pro

Advance Copy Pro 2.0 has several new features.
Click and Copy: Select mutiple Items and Copy and paste them by clicking anywhere on the screen.

Array: Creates a two dimensional array of all selected items.

Copy Offset: Select multiple Items set an offset distance and makes copies. Will allow you to mirror and rotate offset as well.

Instructions:

Click and Copy:

1. Select all the Items that you would like to copy

2. Right Click and select "Click and Copy"

3. Click all places you would like to place the copy
To make multiple Copies of the selected Items hold down the "CTRL" button and click where you would like the Copies
To make copies as new Items Hold down the "Shift Key"
To make multiple copies ans new Items hold the "CTRL + SHIFT" keys

Array:

1. Select all the Items that you would like to array

2. Click Array from the Advance Copy Pro group located on the home tab

3. Select one of the four array options.

4. Enter the number of copies you would like on the Horizontal axis

5. Enter the distance between Items Horizontally (Feet or Meters)

6. Enter the number of copies you would like on the Vertical axis

7. Enter the distance between the Items Vertically (Feet or Meters)

8. Press Ok

Copy Offset:

1. Select all Items that you would like to offset

2. Click the copy offset button located in the Advance Copy Pro Group on the Home tab

3. There are several different options available for your offset
a. Mirror- based on your selection this option will mirror (flip the items 180 degrees) and offset by the distance drawn

b. Rotate- rotates the items based on the degrees input and offsets by the distance drawn

c. Copy - Offsets and copies the Items by x number of times entered

4. Press Ok

5. draw the offset distance by clicking two points on the drawing

---

Author: PlanSwift

Contact Name: Technical Support
Email: Support@planswift.com
Phone: 888-752-6794 Option 2

Posted Mike Ramsey - Dec 29, 2011 at 10:37 AM. This article has been viewed 1956 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2228

Page Multiplier

Article Number: 2263 | Rating: Unrated | Last Updated: Jun 29, 2012 at 9:40 PM

This tool works great when you have several floors that are exactly the same, Such as Apartment Complexes, Hotels, etcâ€¦

Simple to Use:

1. Simply click the Page Multiplier button in the Ribbon on the Home Tab

2. Enter the Number you wish to multiply by and Press OK.

Thatâ€™s It:
The tool will do all the calculations for you.

Posted Mike Ramsey - Jun 29, 2012 at 5:37 PM. This article has been viewed 1171 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2263

ACS - Advanced Costing Suite

About ACS - Advanced Costing Suite

Article Number: 1785 | Rating: Unrated | Last Updated: Aug 9, 2011 at 1:51 PM

ACS - Advanced Costing Suite

The Advanced Costing Suite is an addin to the PlanSwift Takeoff and Estimating software. ACS is for the user who needs a costing solution based on parts and assemblies without having to create it from nothing. The addin installs pre-defined types into the PlanSwift software that sets up an entire costing system within the application in a matter of a few minutes. This alone **greatly simplifies** building your parts and assemblies. Users can then start building their library of items with ease, in fact all the end user needs to do is build their own calculation to quantify the items based on the formulas that work for them and enter a base cost for the item. ***(Note: we do not provide cost data)***

With ACS you are supplied with a robust project setup dialog where you can enter your project defaults for contact info, tax rates and options, global markups, global burden rates, and global overhead rates all based on the item types. All of your library items will inherit their respective global parameters while still giving the user the flexibility to override the default and set a custom rate. ACS will also give you your total per unit cost and pricing based upon the items that are applied to the digitized takeoff.

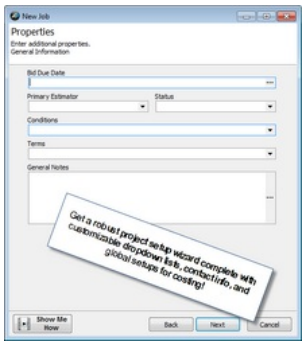
ACS gives you enhanced reporting complete with costs, profits and an abundance of sorting possibilities . We do not build your assemblies and parts we give you the tools to easily build what you need to give you a custom your system in a very short time. **In fact it will save you 120** or more hours of setup time**.

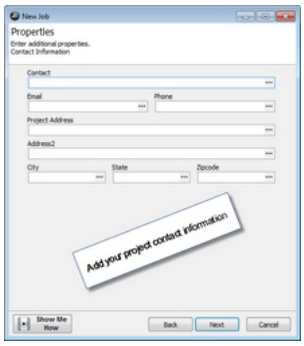
Features & Benefits:

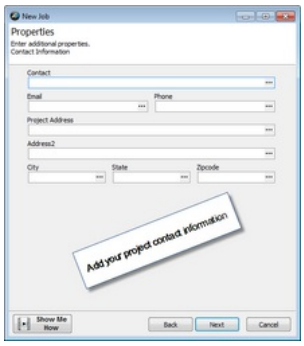
- Quick hassle free installation saves you countless hours of setup
- All back end costing calculations pre-installed
- Intuitive project setup menus
- Global variables for taxes, markup, burden, and overhead (Separate global markups, burdens, and overheads based on the cost type)
- All items have options for additional fixed overhead and burden costs (Great for additional fixed costs such as mobilization costs)
- All Item markups can be individually specified (easily override the global settings)
- Selectable labor wage rates (open and union shops)
- Optional Labor fuel stipend (Easilly include fuel stipends for labor a necessity with todays rising fuel costs.)
- Project fields for due dates, estimators, notes, contact information, Terms and conditions (add relavent information to the job and pull that information into reports)
- Dual tax rates for state, county or city taxes (Need to include tax? A simple check box will add tax to your jobs when required.)
- All Items have options to be tax exempt
- Organizational options for Division, Phase, Location and Zones (Set the option ao a parent and all childre will inherit the value yet still allow you to edit individual items as needed)
- Dynamic takeoff items that convert sub items into unit costs for condensed reporting (report $ per unit)
- Automatic Item numbering utilizing ACS-R.I.N.G (Generate unique item numbers for your parts with the click of a button to use with our Cost updater)
- Job cost updater **Beta**
- Includes all Estimating Views, Lists, and 12 custom reports
- Lists - User editable lists including the Standard 16 CSI Divisions and Sub-divisions
- New - Typical Takeoffs
- New - Deduction Digitizers
- New - Folder Options
- New - UDA Export
- New - Last Modified timestamp on job
- **New - Added change Order # and Change Order Report** !!

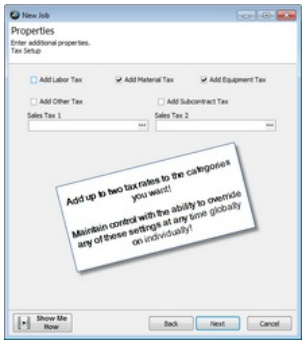
ACS Includes everything listed above for the low price of $249.00!

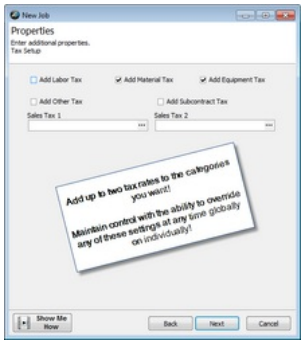
Click the screen shots for larger image!

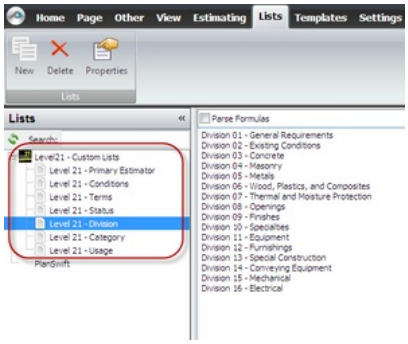

Get a robust project setup wizard complete with customizable dropdown lists, contact info, and global setups for costing!

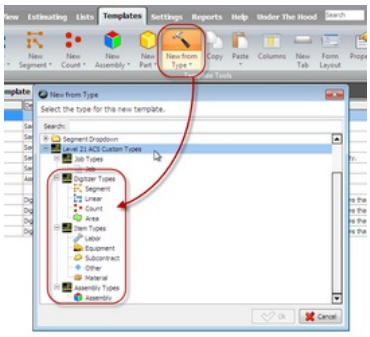


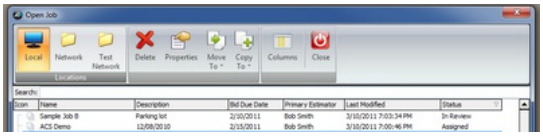


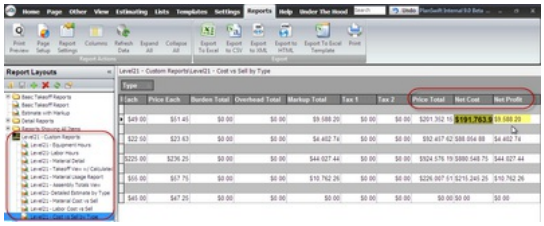

Add up to two tax rates to the categories you want!
Maintain control with the ability to override any of these settings at any time globally or individually!

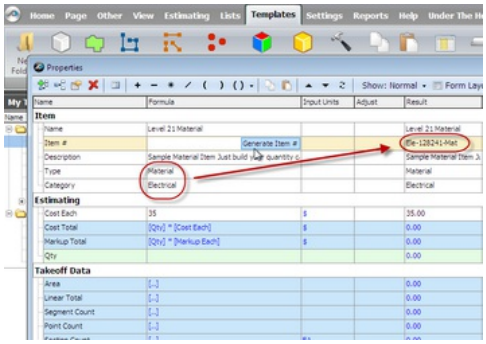

Add up to two tax rates to the categories you want!
Maintain control with the ability to override any of these settings at any time globally or individually!

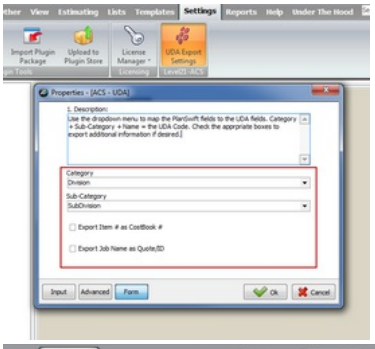


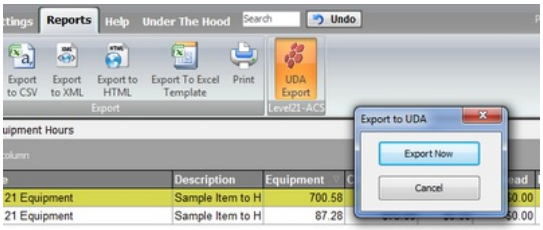












Posted Mike Ramsey - Jun 30, 2011 at 4:15 PM. This article has been viewed 5114 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1785

ACS - User Guide

Article Number: 1783 | Rating: Unrated | Last Updated: Jun 30, 2011 at 4:18 PM

ACS - User Guide

This easy to follow guide will give you all of the information you will need to use the ACS plugin for PlanSwift.

After the installation has completed it is a good idea to restart PlanSwift if you have not already. This will ensure that all of the new types have been refreshed in the system. Now you are ready to begin using the ACS plugin. If you are familliar with job costing this will be very familiar to you.

Creating new parts and assemblies using the new ACS defaults

Open the Templates tab in PlanSwift and select the Level21 sample tab. In here you will find some examples of Digitizer Templates, Parts that include the 5 cost classifications of Material, Labor, Equipment, Subcontract and Other. There are no specific calculations to these items they are there for reference. As you look through them you will notice that they have the same core properties for costing but will have extra properties based on whatever classification they are. Next you will see the Assembly designated by the multi-colored cube. The same parts have been applied to the assembly. Assemblies in ACS will total the sub-items that are attached to it giving you a total assembly price as well as the unit price.

To create a new Item simply press the New From Type button (the one with the hammer icon). From the window that opens expand the Level21 - Custom Types icon. Here you will see the different types that are supplied with the plugin. Expanding the Item Types will give you the 5 options for Material, Labor, Equipment, Subcontract and Other. Select the item you want to create and press OK. A new properties window should have opened for the item you selected. Now all you need to do is press the advanced button to start editing the item to suit your needs. As the end user you just need to build the necessary calculation for the QTY and enter your cost for the item. You can add additional properties to the item to suit your needs. Thats it!

Note: Please note that if you have some templates already created in PlanSwift prior to installing ACS they will inherit the properties of the ACS addin if they are of the same types. This will also apply to Area, Linear, Segment, and Count items.

If you want to add additional defaults or some other customization email us for a price quote on a custom implementation. CustomACS@Level21tech.com

Editing Drop down Lists

All of the menu drop down lists have been created in the Lists Tab of PlanSwift. This allows for simple editing of what ever you want to include. Just open the Level21 Custom Lists and select the list you want to edit. The new items will be available immediately in the drop down menus.

Job Setup / Costing

For the most part the job setup is pretty self explanatory. I will discuss how costing works. On the costing screen you can enter a percentage number (Just enter a number and not the % sign) for each of the five cost categories. Your Markup percentage is added to the total cost of the item including the Burden and Overhead. Burden and Overhead are figured independently of one another and are added to the cost you give the item. If you do not use Burden or Overheads just un-check the boxes. Please note that you can set an individual part

(material, Labor,Equipment, subcontract, other) item Markup to override this setting in the properties of the item applied to the job.

On the tax screen you can add up to two sales tax rates, again just enter a number and not the % sign. You can also select the categories to calculate tax on by checking the appropriate boxes. Please note that you can set an individual part (material, Labor,Equipment, subcontract, other) item to tax exempt to override this setting in the properties of the item applied to the job.

Note: There are also properties on the individual items to add a fixed burden and / or a fixed overhead cost to that item. i.e. an equipment item may have a calculation for an hourly production rate however there may be a delivery cost involved so the item may have a cost each of $50 per hour + a delivery fee in the fixed Overhead or burden of $200 thus adding the $200 to the calculated price total before Markup is applied.

Typically:

Burden - Applied to materials it represents the overhead that is directly related to handling materials (Purchasing, Inspection, stocking etc)
Overhead - Labor that is not directly involved in producing product (Design, Marketing, Accounting, HR, Facilities etc).

Job Setup / Report Options

When you check the boxes on this screen you are enabling the totals for the parent items to be calculated. A takeoff cost will display the cost per takeoff unit based on the items that have been applied thus resulting in a price per LF, SQFT or EA. The same applies to the Assembly method except it totals on the assembly.

Estimating Options

ACS now has custom folders in the Estimating tab. All folders now have an option to create a Typical Takeoff simply by checking the Typical Takeoff check box and entering the quantity to multiply by. This will apply the multiplier to all items within that folder. There are also ACS Option folders to assist you in organizing the takeoff. They function similarly to folders with typical takeoff options but they also give you a visual reference when looking at your data.

- Unit - for unit types in Hotels or appartments
- Base - for the base takeoff, ideal for tract builders
- Options - a little something for everyone

Look for new reports comming soon to enhance these features even more.

Reports

Reports are self explanatory we have created 10 useful reports. you are free to modify these, create your own, or contact us if you are looking for something custom.

UDA Export

The UDA Export function allows you to effortlessly export all of your PlanSwift data (Material, Equipment, Labor, SubContract, and Other items) in to a format that is 100% compatible with the UDA Construc tion Suite. By Default the export uses the Division, Sub Division and item name as the import code required from UDA. These are editable to use other fields within PlanSwift by going to the settings and selecting the UDA Export Settings button on the toolbar. Map the appropriate UDA category settings to one of the PlanSwift fielda in the dropdown list.

To export your data go to the Reports Tab and select the UDA Export Button on the tool bar and perss Export Now. The information is exported into the preformatted MS Excel file for you to save and import into UDA Construction Suite using the 'Import from Etakeoff' option.

Open Job Dialog

Customize the open job dialog window to suit your needs. Simply click on the Open button from the Home tab. Click on the Columns butto and press the green plus symbol to add a new column. Enter any of the following property names to customize your window.

- Name
- Description
- Last Modified
- Notes
- Bid Due Date
- Primary Estimator
- Status
- Contact
- Email
- Phone
- City
- State

Posted Mike Ramsey - Jun 3, 2011 at 2:41 PM. This article has been viewed 3875 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1783

ACS - Installation Instructions

Article Number: 1782 | Rating: Unrated | Last Updated: Jun 30, 2011 at 4:10 PM

Installation:

1. Open PlanSwift if it is not already open.
2. Run your auyomatic updates to ensure you have the latest version of PlanSwift.
3. After purchasing the plugin download the installer from the PlanSwift9 Plugin Sidebar.
4. When prompted press the 'Save' button. .
5. Once you run the installer the installation will just take a minute to complete.
6. After PlanSwift opens for the first time it is recommended that you restart PlanSwift once more to fully refresh the installed types.

To Uninstall:

1. Open PlanSwift if it is not already open.
2. Go to the settings and select 'Interface'.
3. Select 'Show Types in Templates Tab'.
4. Go to the 'Templates' tab and select the 'Types' tab.
5. Select 'Level 21 Custom Types' and Delete it.
6. Goto Lists and select 'Level21 custom Lists' and Delete it.
7. Goto Estimating and select 'Level21 custom Views' and Delete it.
8. Goto Reports and select 'Level 21 Custom Reports' and Delete it.
9. Goto Settings and select Plugin Manager and Delete the R.I.N.G plugin.
10. Restart PlanSwift.

Posted Mike Ramsey - Jun 3, 2011 at 2:28 PM. This article has been viewed 2094 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1782

PlanSwift 9

Excel Summary (BETA)

Article Number: 1781 | Rating: Unrated | Last Updated: May 31, 2011 at 1:49 AM

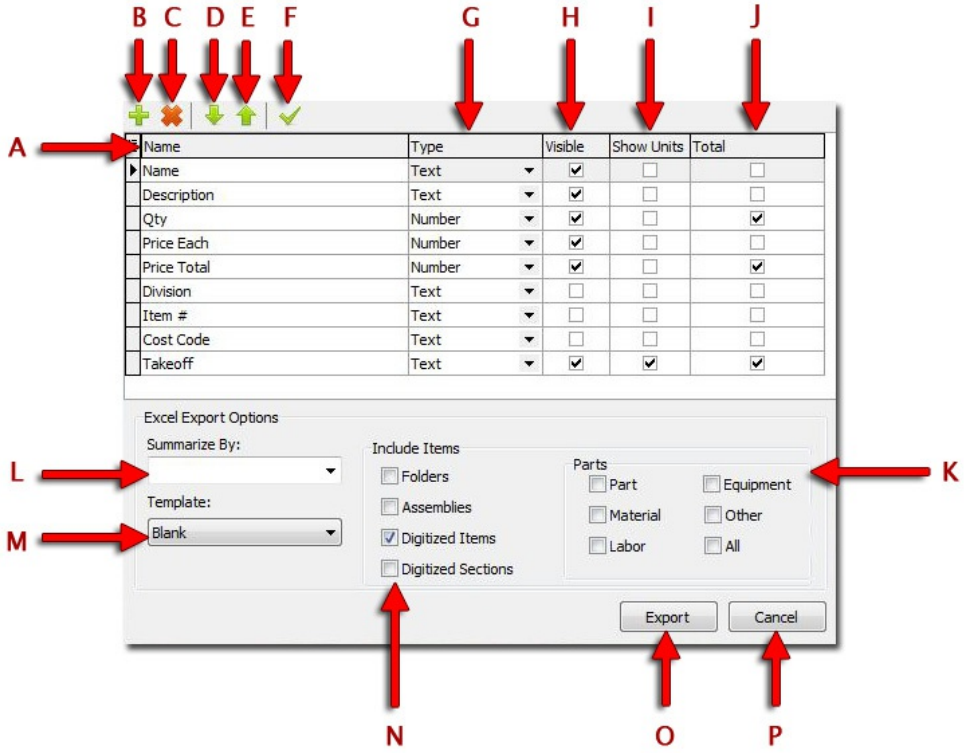
Excel Summary will export you PlanSwift Estimate to Excel and allows you to summarize like Items

*This tools is currently release as a BETA. Though it has been throughly tested you may still encounter a bug.
Please report all bugs to support@planswift.com.
Planswift is not responsible for any errors, miscalculations, hardware failure, due to the use of this tool.
Please **USE AT YOUR OWN RISK.**

Known Issues

- Units do not export over

Interface



A. **Name**
Name of the property to be exported to Excel
B. **Add Column**
Add a new property to Excel Summary
C. **Delete Column**
Deletes the selected property form Excel Summary
D. **Move Column Down**
Moves the selected property down in order
E. **Move Column Up**
Moves the selected property up in order
F. **Accept Changes**
Saves changes of the selected property
G. **Type Column**
Text- Exports the property as text to Excel
Number- Exports the property as a number to Excel
H. **Visible Column**
Any Property with visible checked will be sent to Excel
I. **Show Units column**
When checked, units of the property will be exported to Excel
J. **Total Column**
When Summarize By value is not blank or set to none, any property with totaling check will be grouped and totaled
K. **Parts Group**
Any Item checked in the Parts group will be included in the export to excel
L. **Summarize By**
When not left blank, all properties that have the type of text will show in the summarize by dropdown box. when a property is selected. any items that match the summarized by selected item will be grouped and select properties will be totaled
M. **Template**
Currently there are not any templates included with Excel Summary
N. **Included Items**
Any item checked in included items will be included in the export.
O. **Export**
Starts the export process
P. **Cancel**
Cancels the Excel Summary tool

Posted Mike Ramsey - May 30, 2011 at 11:45 PM. This article has been viewed 83 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1781

PlanSwift 8

There are no articles under this category.

PlanSwift 9 'By the Tabs'

There are no articles under this category.

Help

Refer A Friend

Article Number: 1645 | Rating: Unrated | Last Updated: Jul 15, 2010 at 3:28 PM

Posted Mike Ramsey - Jul 15, 2010 at 3:28 PM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1645

Software License Options

Article Number: 1643 | Rating: Unrated | Last Updated: May 24, 2012 at 8:41 PM

Software License Options - Automatic activations, manual activations

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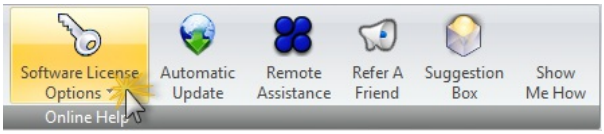
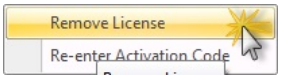
From withing the Software License Option section you can remove or active your PlanSwift software license.

Remove Software License

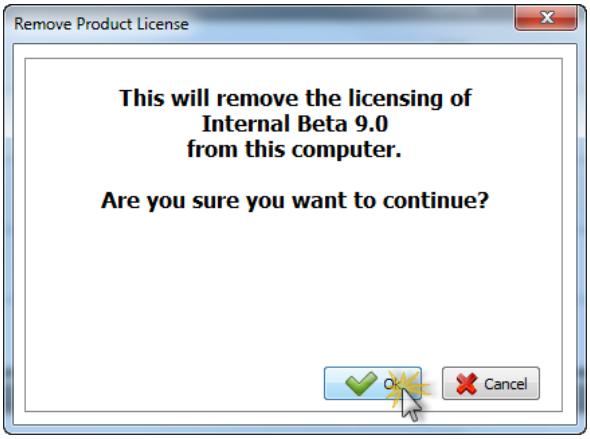
1. Select the 'Software License Option' button.



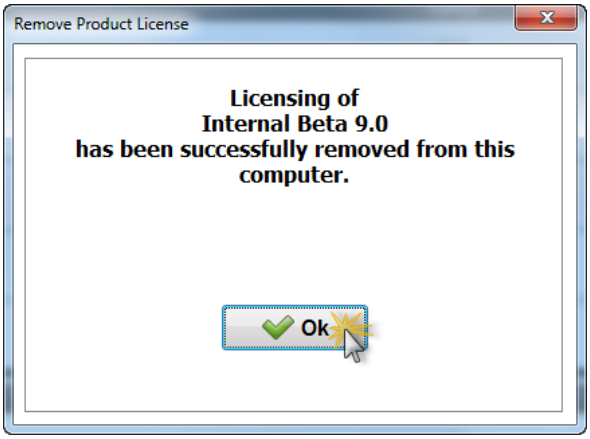
2. To remove your license select the 'Remove License' option drop down button.



3. Click 'OK' to confirm you want to remove your license.

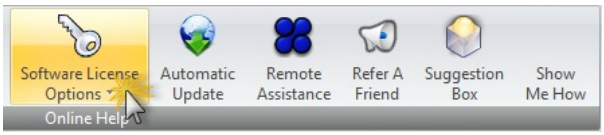


4. Your license will be removed, click 'OK' to close the window.

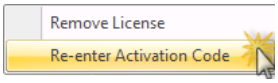


Re-Ener Activation Code

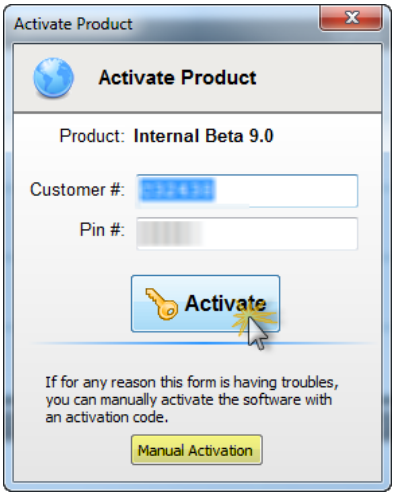
1. Select the 'Software License Option' button.



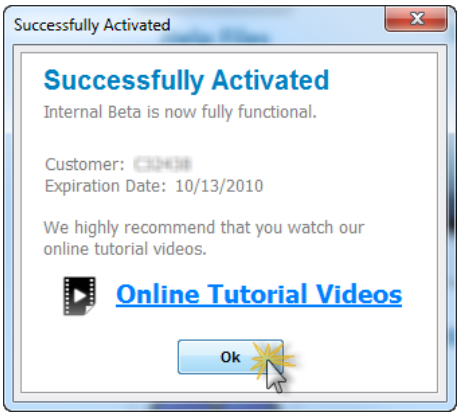
2. To Re-enter your activation code select the 'Re-enter Activation Code' button.



3. To automatically active PlanSwift enter your Customer # and Pin then click 'Activate'.


Activate Product
Activate Product
Product: Internal Beta 9.0
Customer #:
Pin #:
Activate
If for any reason this form is having troubles, you can manually activate the software with an activation code.
Manual Activation

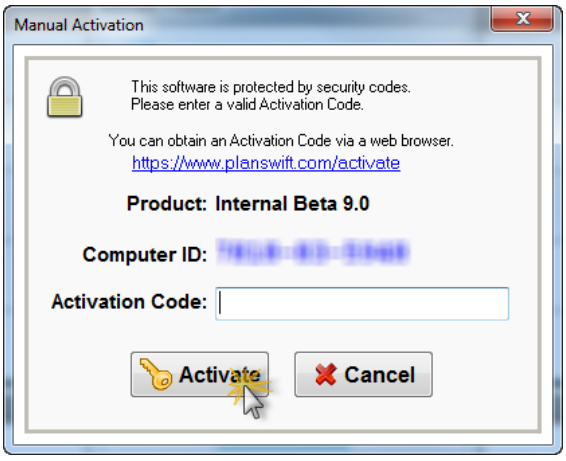
4. You wil be shown the successful activation window. To close the window click 'OK'.



5. If you have troubles you can Manually activate PlanSwift by selecting the 'Manual Activation' button.

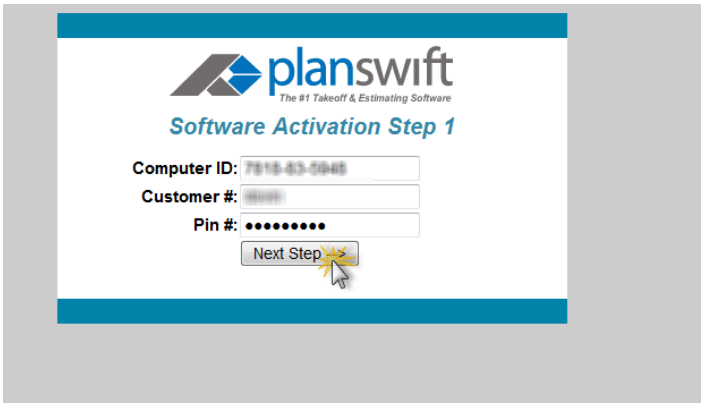
6. Make note of your Computer ID.

7. Either click on the link or enter https://www.planswift.com/activate in your web browser to go to PlanSwift activation page.

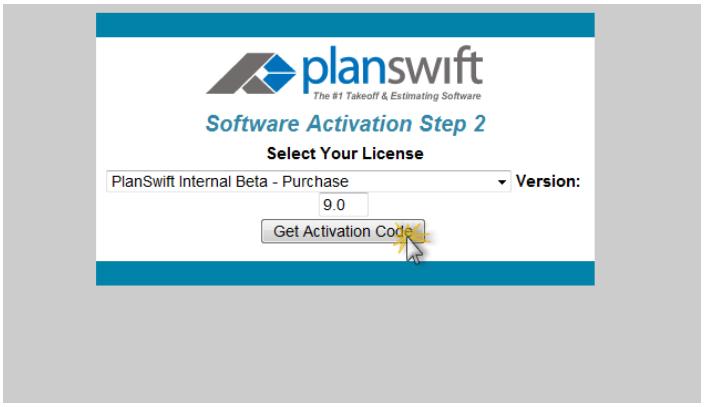


8. On PlanSwift's activation page enter your computer id from step 6, your customer number and pin number.

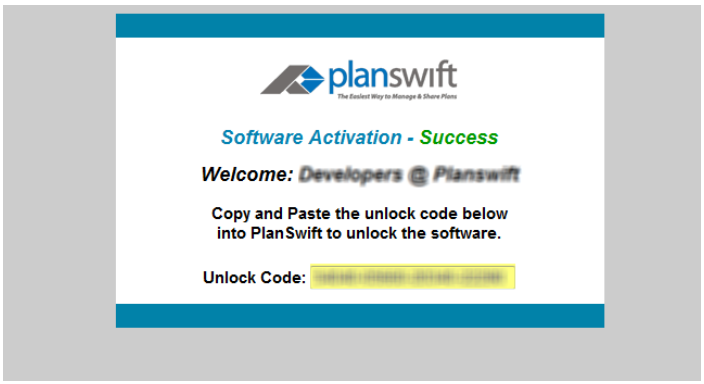
9. Click the 'Next Step' button to continue.



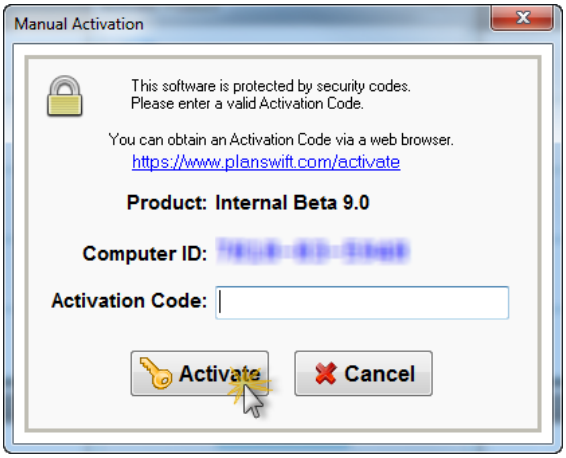
10. Select your license from the drop down menu and enter teh version software you have.
11. Click the 'Get Activation Code' to get your code.



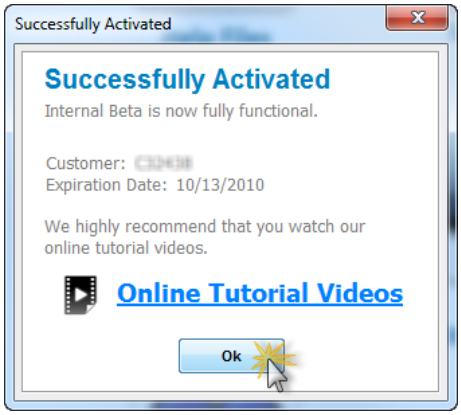
12. When successful you will given your Unlock Code. Make note of it before leave this page.


planswift
Software Activation - Success
Welcome: Developers @ Planswift
Copy and Paste the unlock code below
into PlanSwift to unlock the software.
Unlock Code:

13. In PlanSwift enter the Unlock Code you received in step 12 into the Activation code box.
14. Click the 'Activate' button to activate your copy of PlanSwift.



15. When complete click 'OK' to close this window, or go to the online videos.



Posted Mike Ramsey - Jul 15, 2010 at 1:47 PM. This article has been viewed 2214 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1643

Online Support Chat

Article Number: 1651 | Rating: Unrated | Last Updated: Jan 21, 2011 at 2:49 PM

PlanSwift allow you to have an online chat with our support or sales staff from inside your software.

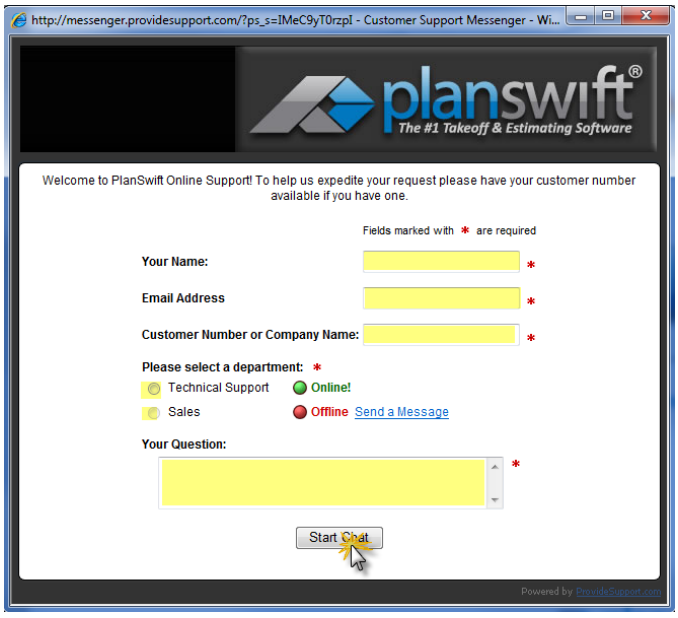
1. Select the 'Online Support Chat' button to begin.

2. Enter your name, address, and customer number or name and select the department you would like to chat with.

3. Enter your initial question.

4. Click the 'Start Chat' button.

5. Your support person will start your chat momentarily.


http://messenger.providesupport.com/?ps_s=IMeC9yT0rzpI - Customer Support Messenger - Wi...
planswift®
The #1 Takeoff & Estimating Software
Welcome to PlanSwift Online Support! To help us expedite your request please have your customer number available if you have one.
Fields marked with * are required
Your Name:
Email Address
Customer Number or Company Name:
Please select a department: *
Technical Support
Online!
Sales
Offline
Send a Message
Your Question:
Start Chat
Powered by ProvideSupport.com

Posted Mike Ramsey - Jul 19, 2010 at 2:24 PM. This article has been viewed 1498 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1651

Join a Free Webinar

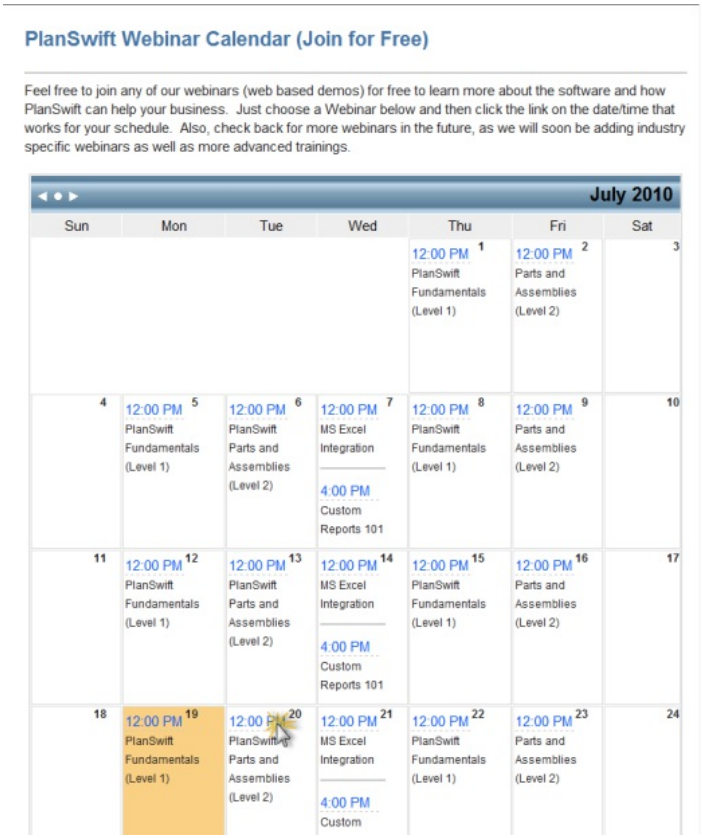
Article Number: 1654 | Rating: Unrated | Last Updated: Jan 21, 2011 at 9:43 AM

You can sign up for and attend free PlanSwift training videos right from inside your program.

1. Confirm you have an internet connection.

2. Select the 'Join a Free Webinar' button.

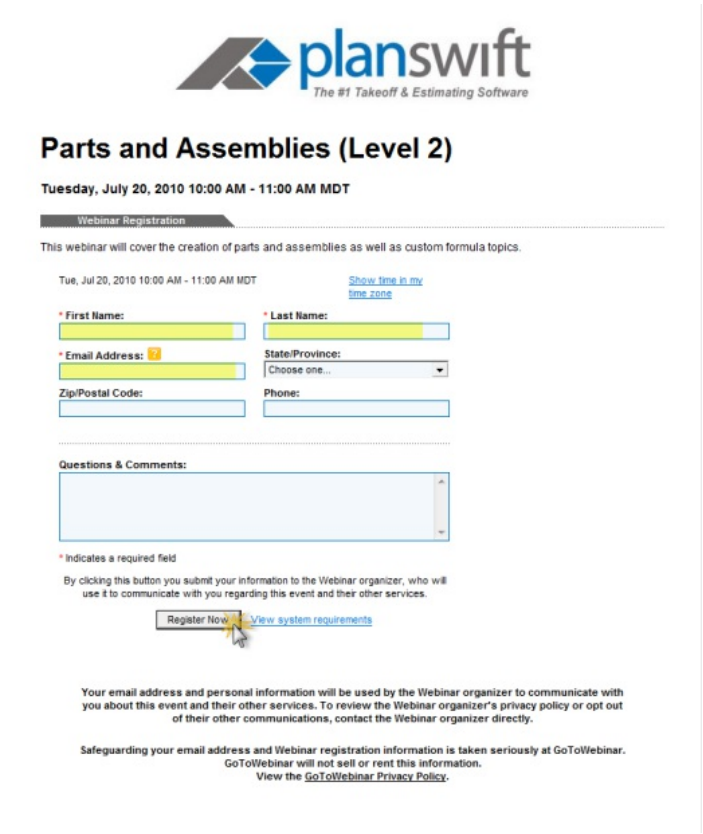
3. Select the training webinar you are interested in. You can repeat this process to register for multiple webinars.


PlanSwift Webinar Calendar (Join for Free)
Feel free to join any of our webinars (web based demos) for free to learn more about the software and how PlanSwift can help your business. Just choose a Webinar below and then click the link on the date/time that works for your schedule. Also, check back for more webinars in the future, as we will soon be adding industry specific webinars as well as more advanced trainings.
July 2010
Sun
Mon
Tue
Wed
Thu
Fri
Sat
12:00 PM PlanSwift Fundamentals (Level 1)
12:00 PM Parts and Assemblies (Level 2)
12:00 PM MS Excel Integration
4:00 PM Custom Reports 101

4. Complete the required registration information.

   Please note a confirmation email and reminder email will be sent to the email address you provide, so please use one that you will receive.

5. Click the 'Register Now' button to continue. ***(Please note: All of our webinars are scheduled MST you can show the time in your time zone by pressing the 'Show Time in My Time Zone' link)***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Parts and Assemblies (Level 2)
Tuesday, July 20, 2010 10:00 AM - 11:00 AM MDT
Webinar Registration
This webinar will cover the creation of parts and assemblies as well as custom formula topics.
Tue, Jul 20, 2010 10:00 AM - 11:00 AM MDT
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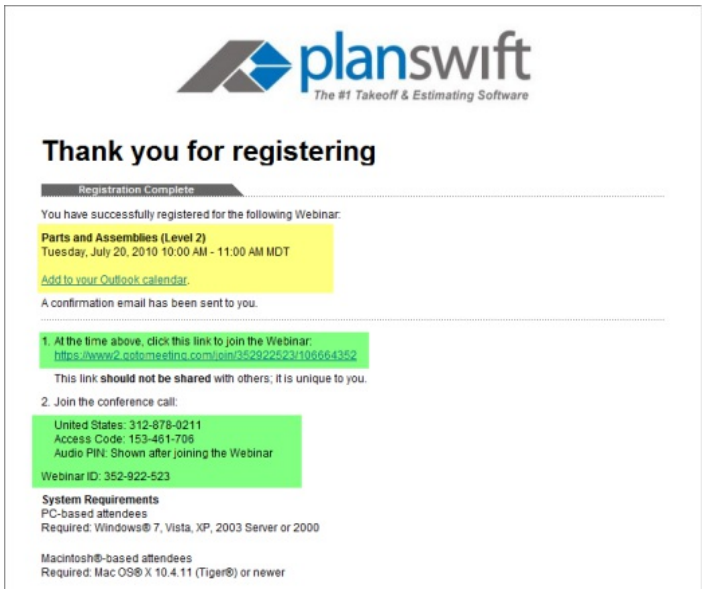
6. Make note of the time of the webinar. Generally our class times are in the Mountain Time Zone.

7. At the time of the meeting you can either select the link in this or the other messages or go to www.gotomeeting.com, and 'Join a Meeting'.

   Audio is provided along with the webinar over your computer, however if you would prefer you can call into the webinar at the number below and enter the Webinar ID.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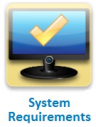
Access Code: 153-461-706
Audio PIN: Shown after joining the Webinar
Webinar ID: 352-922-523
System Requirements
PC-based attendees
Required: Windows® 7, Vista, XP, 2003 Server or 2000
Macintosh®-based attendees
Required: Mac OS® X 10.4.11 (Tiger®) or newer

Posted Mike Ramsey - Jul 19, 2010 at 3:30 PM. This article has been viewed 1269 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1654

System Requirements

Article Number: 1653 | Rating: Unrated | Last Updated: Jul 19, 2010 at 3:00 PM



For your current version of PlanSwift to work optimally you should use in on a computer with at least the minimum system requirements.

1. To access the current system requirements select the 'System Requirements' button.

2. Confirm your computer meets the minimum system requirements listed.

> Please Note: PlanSwift does not run on the Macintosh operating system. Please consider using a Windows emulator like Parallels, or you can try out our web based version at www.OnlineTakeoff.com

Posted Mike Ramsey - Jul 19, 2010 at 3:00 PM. This article has been viewed 1197 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1653

PlanSwift Online Forum

Article Number: 1642 | Rating: Unrated | Last Updated: Jan 21, 2011 at 4:00 PM

OR

The PlanSwift Online Forum is your place to connect with other users of PlanSwift to share and learn new ideas. You can also connect with PlanSwift experts inside the forum to gain great information.

1. To connect with the forum from inside PlanSwift you need to have an internet connect then select the 'PlanSwift Online Forum' button.

OR

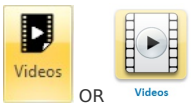
2. You will need to register to become a forum member to post questions and comments. You can register by clicking here.

Posted Mike Ramsey - Jul 15, 2010 at 1:19 PM. This article has been viewed 1116 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1642

Videos

Article Number: 1640 | Rating: Unrated | Last Updated: May 31, 2012 at 3:30 PM



OR

The tutorial videos contains all the How-To videos to show you how to accomplish any task you want.

1. Click the Help tab and then one of the Videos buttons.

OR

2. The next screen presents you with the videos for all versions of PlanSwift. They are broken into

categories that are specific to versions of PlanSwift, for example: PlanSwift 8 Videos and PlanSwift 9 Videos.

Each category is broken down further into sub categories based on the type of video it is.

3. You can also visit our YouTube channel here or do a quick search on YouTube for our video's here.

Posted Mike Ramsey - Jul 15, 2010 at 11:50 AM. This article has been viewed 1074 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1640

FAQ - Frequently Asked Questions

Article Number: 1652 | Rating: Unrated | Last Updated: Jan 21, 2011 at 2:51 PM

Often you will have the same question as many other customers. We have assembled the answers to these in the Frequently Asked Question (FAQ) section of PlanSwift Online Help System.

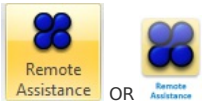
1. Ensure you have internet access.
2. To access the FAQs select the FAQ button.
3. Your page in PlanSwift will access the PlanSwift Online Help System FAQ section.

Posted Mike Ramsey - Jul 19, 2010 at 2:37 PM. This article has been viewed 945 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1652

Remote Assistance

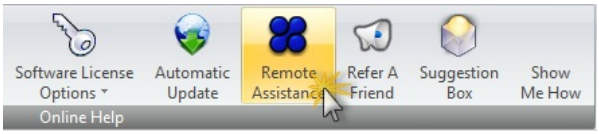
Article Number: 1644 | Rating: Unrated | Last Updated: Jan 21, 2011 at 3:50 PM



OR

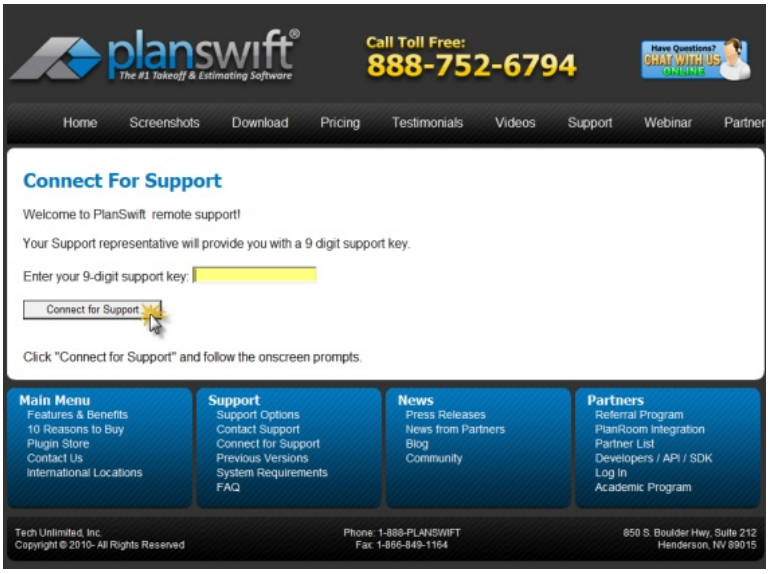
PlanSwift support personnel can assist you remotely from right inside your software.

1. Select the 'Remote Assistance' button to begin.



OR

2. Enter your Customer number or name.
3. Your support representative will provide you with the support key. Enter it when asked.
4. Click the 'Connect for Support' button to begin your session.
5. You will be automatically connect with remote assistance.

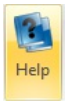


Posted Mike Ramsey - Jul 15, 2010 at 3:21 PM. This article has been viewed 900 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1644

Help

Article Number: 1639 | Rating: Unrated | Last Updated: Jul 19, 2010 at 2:11 PM

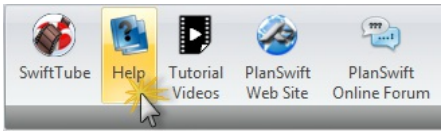


OR

The 'Help' button will allow you to access the PlanSwift Knowledgebase from inside PlanSwift.

1. Select the 'Help' button.

2. From inside the knowledgebase you can search information or browse sections of content.



OR

Posted Mike Ramsey - Jul 15, 2010 at 11:46 AM. This article has been viewed 856 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1639

PlanSwift.com

Article Number: 1641 | Rating: Unrated | Last Updated: Jul 23, 2010 at 9:23 AM

The 'PlanSwift Web Site' button will allow you to access PlanSwift.com from inside PlanSwift Estimating and Takeoff Software.

1. To access PlanSwift.com select the 'PlanSwift Web Site' button. As long as you have an internet connection you will be connected to the main site.

Posted Mike Ramsey - Jul 15, 2010 at 11:56 AM. This article has been viewed 835 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1641

Home

Article Number: 1635 | Rating: Unrated | Last Updated: Jul 15, 2010 at 10:25 AM

The 'Home' button will return you to the main help screen from anywhere in the help screens.

1. Click the 'Home' button to return.

Posted Mike Ramsey - Jul 15, 2010 at 10:25 AM. This article has been viewed 793 times.

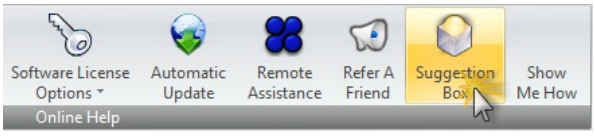
Online URL: http://www.planswift.com/phpkb/article.php?id=1635

Suggestion Box

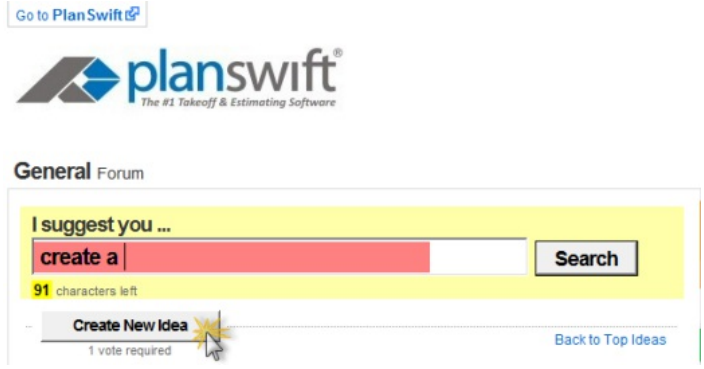
Article Number: 1646 | Rating: Unrated | Last Updated: Jul 15, 2010 at 3:41 PM

At PlanSwift we are always improving our software to make it better for you. As part of that we you like to hear from you about what you would like to see improved.

1. To make a suggestion select the 'Suggestion Box' button.



2. Enter your suggestion for PlanSwift in the box then click 'Create New Idea'.



Thank you for taking the time to help with improving PlanSwift

Posted Mike Ramsey - Jul 15, 2010 at 3:40 PM. This article has been viewed 772 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1646

Refresh

Article Number: 1637 | Rating: Unrated | Last Updated: Jul 15, 2010 at 10:44 AM

The 'Refresh' button updates the content on the help screen you are in.

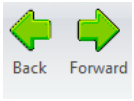
1. To updated the content click the 'Refresh' button.

Posted Mike Ramsey - Jul 15, 2010 at 10:44 AM. This article has been viewed 750 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1637

Help Back and Forward

Article Number: 1636 | Rating: Unrated | Last Updated: Jul 15, 2010 at 10:39 AM



The 'Back' and 'Forward' buttons in the Help tab allow you to navigate backwards or forwards one page within the help sections.

1. To move back one page click the 'Back' button.

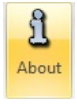
2. To move forward one page click the 'Forward' button.

Posted Mike Ramsey - Jul 15, 2010 at 10:39 AM. This article has been viewed 720 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1636

About

Article Number: 1649 | Rating: Unrated | Last Updated: Jul 19, 2010 at 1:47 PM

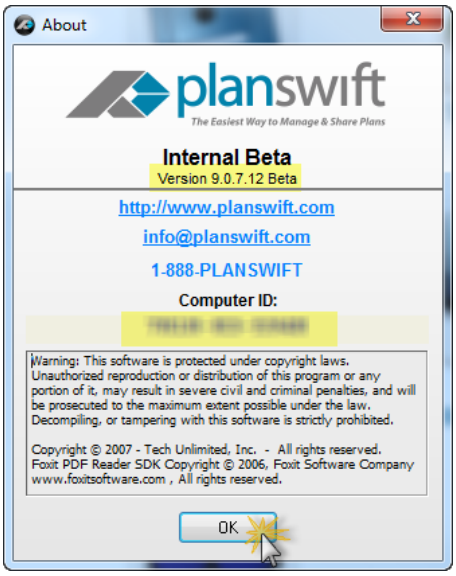


To learn about basic information regarding your copy of PlanSwift use the 'About' button.

1. Select the 'About' button to begin.

2. A new window will display your current version and update number. Here being PlanSwift 9.0 updated version 7.12. You can also find your computer ID here.

3. When done, click the 'OK' button to close the window.


About
planswift
The Easiest Way to Manage & Share Plans
Internal Beta
Version 9.0.7.12 Beta
http://www.planswift.com
info@planswift.com
1-888-PLANSWIFT
Computer ID:
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Foxit PDF Reader SDK Copyright © 2006, Foxit Software Company
www.foxitsoftware.com , All rights reserved.
OK

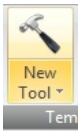
Posted Mike Ramsey - Jul 19, 2010 at 1:47 PM. This article has been viewed 677 times.

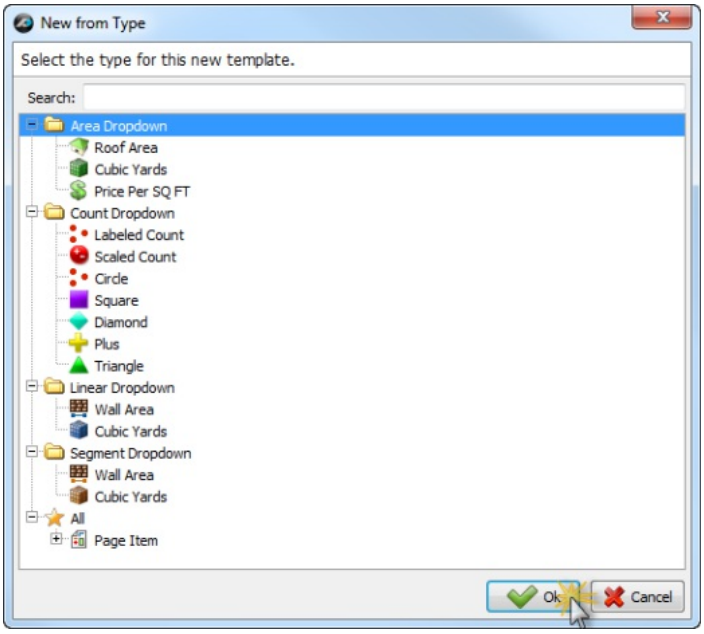
Online URL: http://www.planswift.com/phpkb/article.php?id=1649

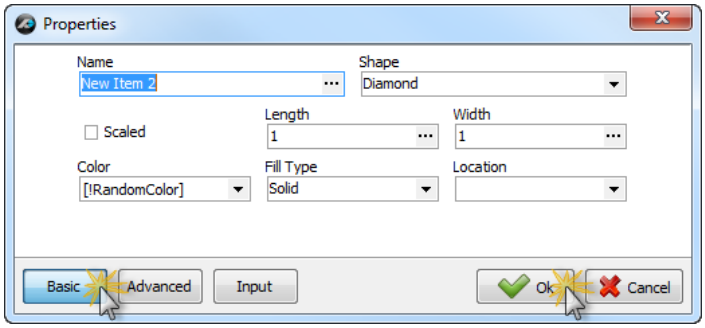
Templates

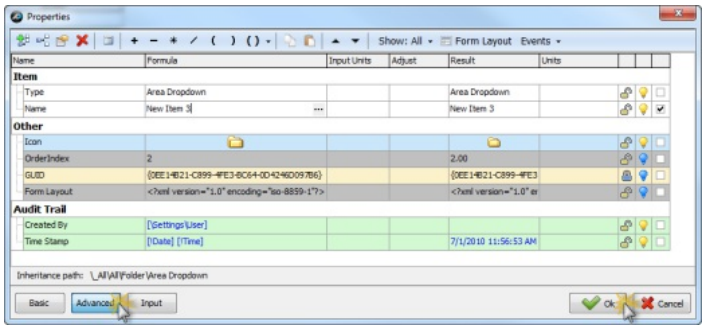
Template New Tool or Sub-Item Tool

Article Number: 398 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:30 PM









Posted Mike Ramsey - Jul 1, 2010 at 12:03 PM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=398

Template Form Layout

Article Number: 401 | Rating: Unrated | Last Updated: Jul 1, 2010 at 12:22 PM

Posted Mike Ramsey - Jul 1, 2010 at 12:22 PM. This article has been viewed 0 times.

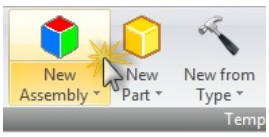
Online URL: http://www.planswift.com/phpkb/article.php?id=401

Template New Assembly or Sub-Item Assembly

Article Number: 396 | Rating: 2/5 from 2 votes | Last Updated: Aug 11, 2011 at 10:04 AM

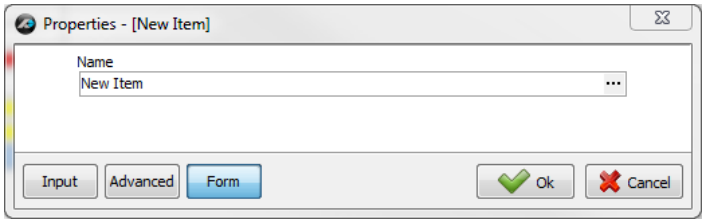
From within the Templates tab you can create assemblies for use in estimating and takeoff before you need then, or export/import them into jobs. Assemblies allow you to pre-build all the materials and tools you will need for a specific item, such as concrete slabs.

1. To create a new assembly select the 'New Assembly' button, to create a new sub-item assemble select the lower portion of the button.



2. The 'Form' properties window allows you to name your assemble and set basic information about the assembly.

3. When finished click the 'OK' button to continue, you have created a new assemble for your use.



4. The 'Advanced' Assembly option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

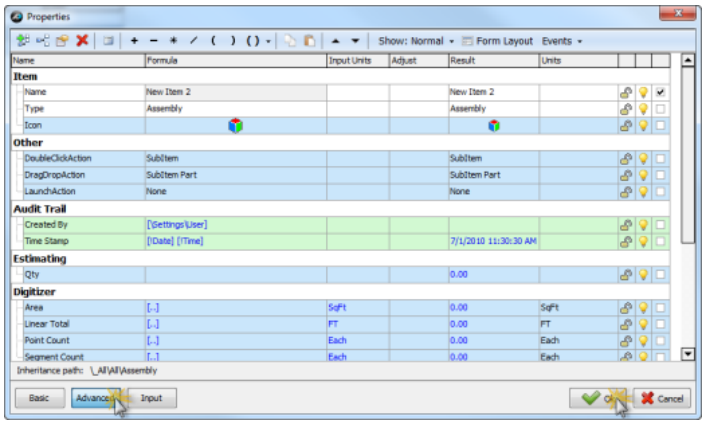
    Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

    Light bulb - Indicated if the row is visible or not.

        Yellow Bulb - Row Visible.

        Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Assembly for your use.



7. Once the assembly has been created you can add your other materials, labor, equipment etc as sub items of the assembly. This can be done in several ways depending on how you have created your items.

- You can right click on one of your other parts in your templates and select copy, then select the newly created assembly and right click and select 'Paste as Sub Item'
- You can select the newly created assembly and add a 'New Item as a Sub Item'. See Creating parts for more information about this.
- To watch a video about advanced properties, click here.

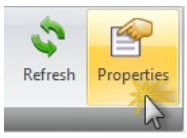
Posted Mike Ramsey - Jul 1, 2010 at 11:43 AM. This article has been viewed 4456 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=396

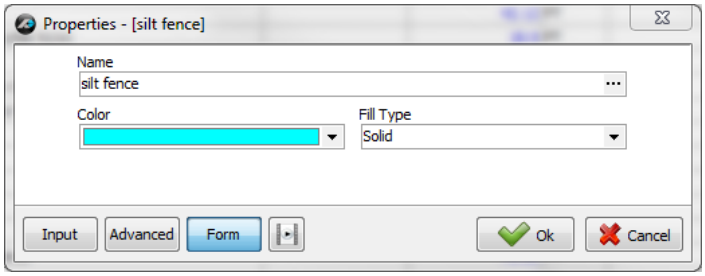
Estimate and Templates Column Properties

Article Number: 387 | Rating: 5/5 from 1 votes | Last Updated: Jul 27, 2011 at 10:05 AM

The 'Properties' button allows you to change, add, or delete estimate column properties, including adding formulas and advance items.



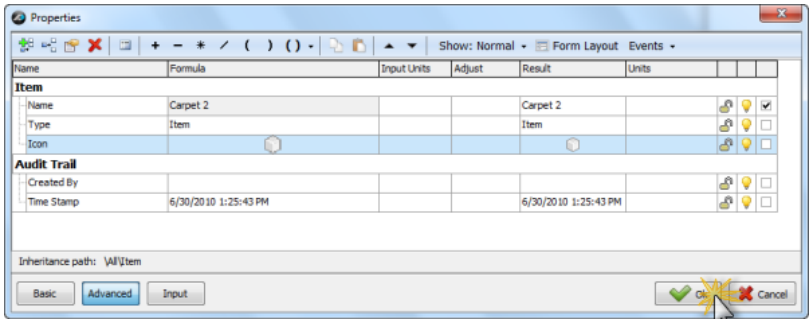
The Form window allows you to change the name of the column.



To make greater changes select the Advanced button.

In the advanced window you can make any change you would want. You can update information, add formulas, and see when the column was changed.

When done click the 'Ok' button to close the window.



Posted Mike Ramsey - Jun 30, 2010 at 2:42 PM. This article has been viewed 3988 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=387

Estimate and Template Adjust Buttons

Article Number: 389 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:29 PM

The 'Adjust' buttons allow you to quickly change the level and sub-level of columns in your estimates.

'Up Arrow' - Moves the selected column up one level.

'Down Arrow' - Moves the selected column down one level.

'Left Arrow' - Moves the selected column up one sub-level.

'Right Arrow' - Moves the selected column down one sub-level.

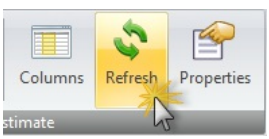
Posted Mike Ramsey - Jun 30, 2010 at 2:54 PM. This article has been viewed 3295 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=389

Estimate and Templates Refresh Button

Article Number: 386 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:24 PM

Use the 'Refresh' button to refresh the screen and estimating numbers with any updates you may have made.

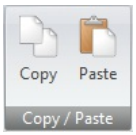


Posted Mike Ramsey - Jun 30, 2010 at 2:24 PM. This article has been viewed 2893 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=386

Copy and Paste Buttons

Article Number: 388 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:27 PM



'Copy' - Copies the selected information to your clipboard.

'Paste' - Copies estimate information from your clipboard.

Posted Mike Ramsey - Jun 30, 2010 at 2:47 PM. This article has been viewed 2805 times.

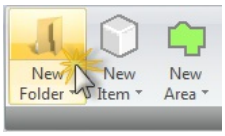
Online URL: http://www.planswift.com/phpkb/article.php?id=388

Template New Folder or Sub-Folder

Article Number: 390 | Rating: Unrated | Last Updated: Jul 27, 2011 at 10:26 AM

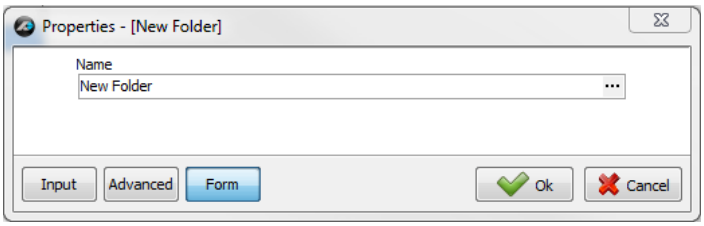
Folders are a great way to arrange and organize your information.

1. To create a New Template Folder select the 'New Folder' button. If you would like to create a sub-folder select the lower portion of the button.



2. The 'Form' folder option allows you to enter a folder name.

3. When done click the 'OK' button to continue, you have created a new folder for your use.



4. The 'Advanced' folder option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Other - Other folder properties grouped together for easy reference.

Icon - This is the Icon used to display the folder.

Item - Properties related to the folder.

Name - This is the descriptive name for the folder.

Type - Type of folder.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

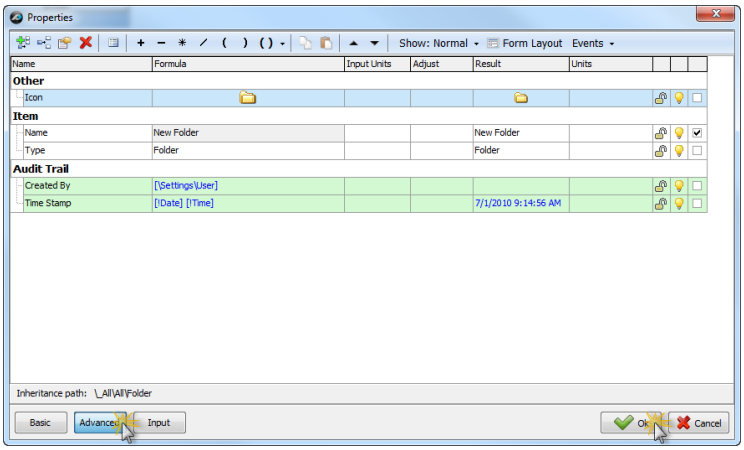
Padlock - Allows you to lock and unlock the contents of that row. Clicking in the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a new folder for your use.



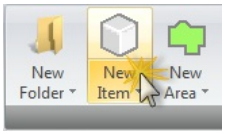
Posted Mike Ramsey - Jul 1, 2010 at 9:27 AM. This article has been viewed 2781 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=390

Template New Item or Sub-Item

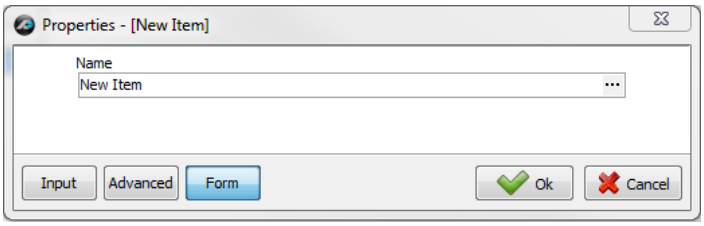
Article Number: 391 | Rating: Unrated | Last Updated: Aug 3, 2011 at 10:46 AM

1. To create a New Template Item select the 'New Item' button. If you would like to create a sub-item select the lower portion of the button.



2. The 'Form' item option allows you to enter an item name.

3. When done click 'OK' button to continue, you have created a new item for your use.



4. The 'Advanced' folder option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Item - Properties related to the folder.

Name - This is the descriptive name for the folder.

Type - Type of folder.

Other - Other folder properties grouped together for easy reference.

Icon - This is the Icon used to display the folder.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the object. (This information requires that the User Name be added in the settings under Company.)

Time Stamp - Date and Time the Folder was updated.

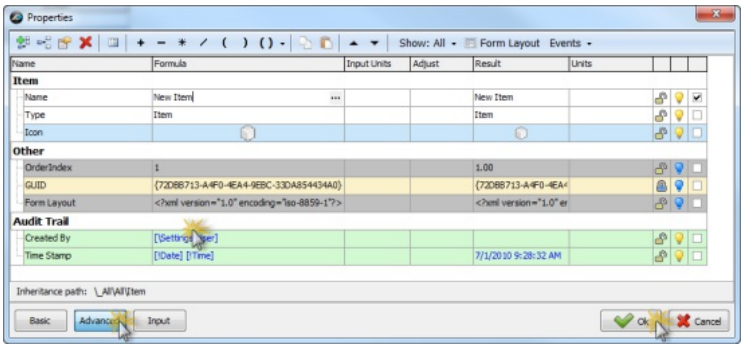
Padlock - Allows you to lock and unlock the contents of that row. Clicking in the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a new item for your use.



Posted Mike Ramsey - Jul 1, 2010 at 9:37 AM. This article has been viewed 2147 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=391

Template New Part or Sub-Item Part

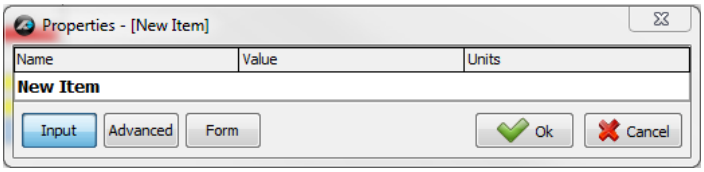
Article Number: 397 | Rating: Unrated | Last Updated: Aug 9, 2011 at 10:04 AM

From within the Templates tab you can create new part for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new part select the 'New Part' button, to create a new sub-item part select the lower portion of the button.

2. The 'Form' properties window allows you to name your part, set the cost and markup.

3. When finished click the 'OK' button to continue, you have created a new part for your use.



4. The 'Advanced' Parts option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

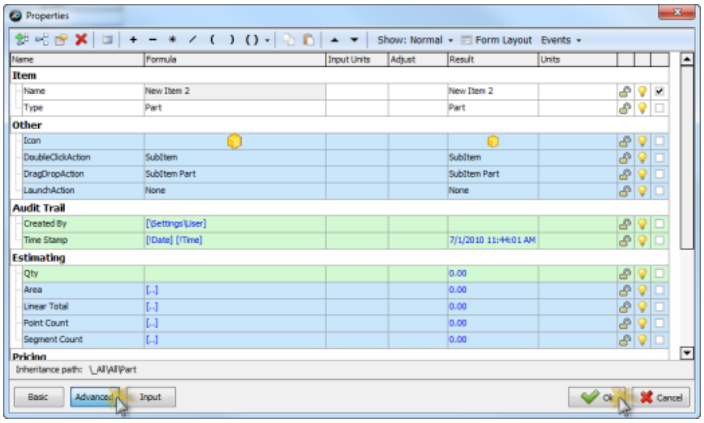
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Part for your use.



To watch the video on this topic, click here.

Posted Mike Ramsey - Jul 1, 2010 at 11:50 AM. This article has been viewed 2128 times.

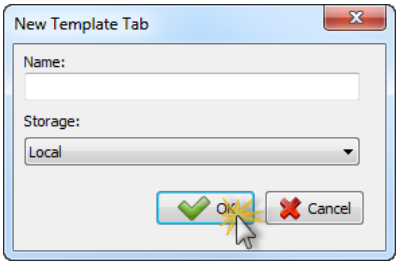
Online URL: http://www.planswift.com/phpkb/article.php?id=397

Create New Template Tab

Article Number: 400 | Rating: Unrated | Last Updated: Jul 6, 2010 at 3:08 PM

The 'New Tab' button allows you to add tabs to the template desktop. These tabs allow you to organize your assemblies, tool, parts and other items into useful group. You can also export and import tab between jobs.

1. Select the 'New Tab' button to open a new tab.
2. Enter a name and update the storage location is you want.
3. When you are done click the 'Ok' button, your new tab will be available at the top of your desktop.



Posted Mike Ramsey - Jul 1, 2010 at 12:18 PM. This article has been viewed 2050 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=400

Template New Area or Sub-Item Area

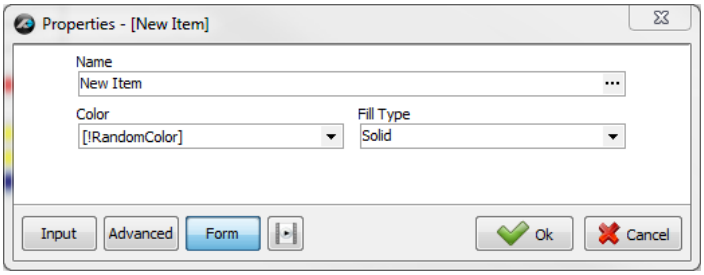
Article Number: 392 | Rating: Unrated | Last Updated: Jul 27, 2011 at 10:41 AM

From within the Templates tab you can create Areas for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new area select the 'New Area' button, to create a new sub-item area select the lower portion of the button.

2 The 'Form' properties window allows you to name your area, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new area for your use.



4. The 'Advanced' Area option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other area estimating rules for use later.

Item - This section allows you to set general information about the template area including the name and the area type.

Other - Under this section you can set some of the action the area will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

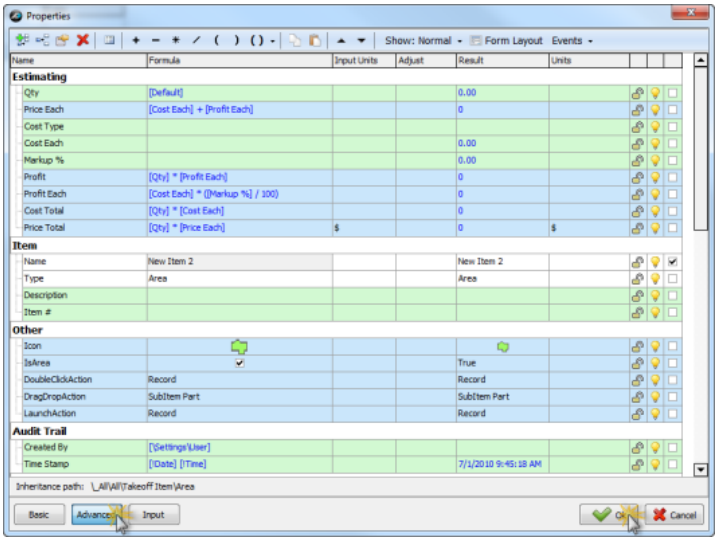
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Area for your use.



Posted Mike Ramsey - Jul 1, 2010 at 9:58 AM. This article has been viewed 1924 times.

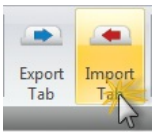
Online URL: http://www.planswift.com/phpkb/article.php?id=392

Import Tabs

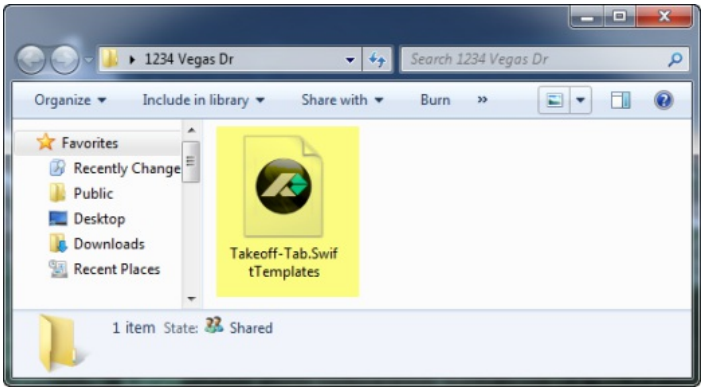
Article Number: 568 | Rating: Unrated | Last Updated: Jul 6, 2010 at 3:14 PM

You can import tabs you have previously exported into any job.

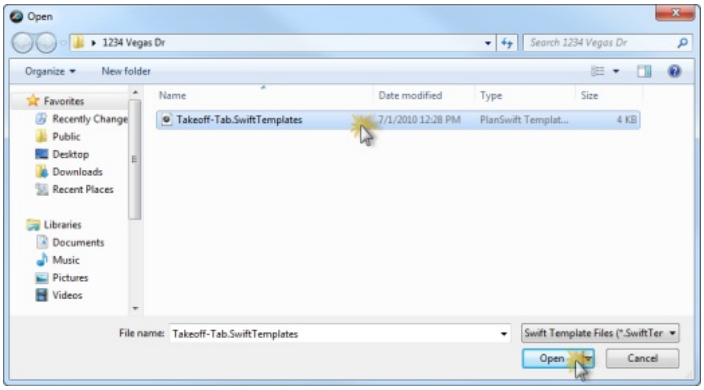
1. Select the 'Import Tab' button.



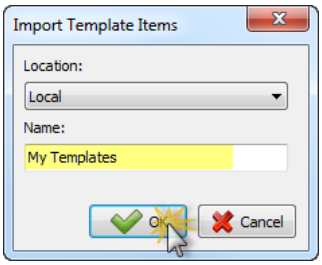
Here is an example of what a PlanSwift tab file would look like.



2. Select the tab file you want to import. You can either enter the information or navigate to the file.
3. Click the 'Open' button to continue.



4. Select the location to store the tab and enter the name for the tab.
5. Click 'Ok' and the tab will be loaded and available to you.



Posted Mike Ramsey - Jul 1, 2010 at 3:28 PM. This article has been viewed 1708 times.

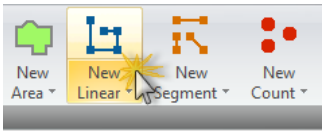
Online URL: http://www.planswift.com/phpkb/article.php?id=568

Template New Linear or Sub-Item Linear

Article Number: 393 | Rating: Unrated | Last Updated: Jul 27, 2011 at 10:44 AM

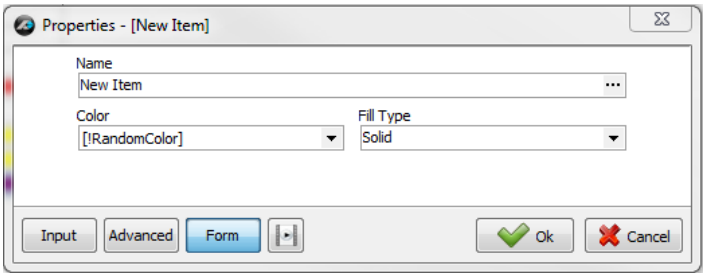
From within the Templates tab you can create linear for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new linear select the 'New Linear' button, to create a new sub-item linear select the lower portion of the button.



2. The 'Form' properties window allows you to name your linear section, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new linear section for your use.



4. The 'Advanced' Linear option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other linear estimating rules for use later.

Item - This section allows you to set general information about the template linear including the name and the linear type.

Other - Under this section you can set some of the action the linear will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

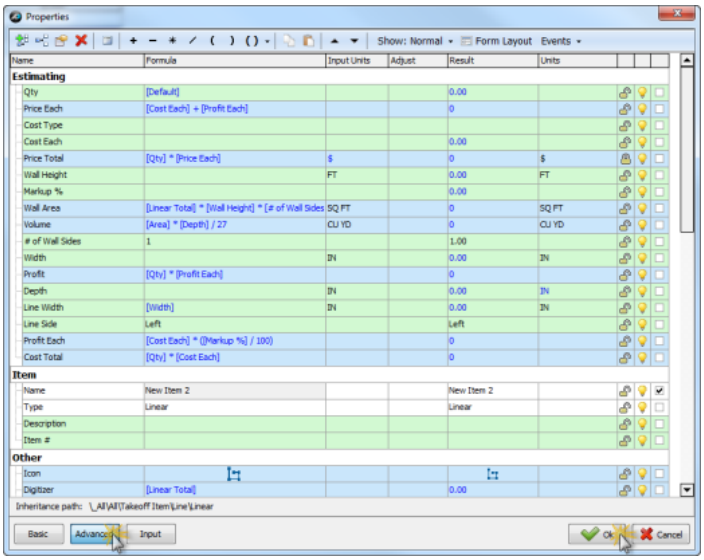
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Linear for your use.



Posted Mike Ramsey - Jul 1, 2010 at 10:24 AM. This article has been viewed 1677 times.

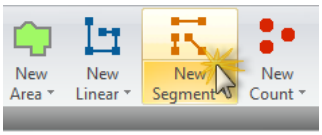
Online URL: http://www.planswift.com/phpkb/article.php?id=393

Template New Segment or Sub-Item Segment

Article Number: 394 | Rating: Unrated | Last Updated: Jul 27, 2011 at 10:50 AM

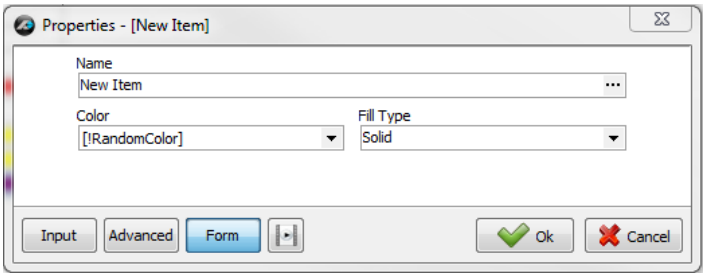
From within the Templates tab you can create segment for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new segment select the 'New Segment' button, to create a new sub-item segment section select the lower portion of the button.



2. The 'Form' properties window allows you to name your segment section, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new segment section for your use.



4. The 'Advanced' segment option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other segment estimating rules for use later.

Item - This section allows you to set general information about the template segment including the name and the segment type.

Other - Under this section you can set some of the action the segment will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

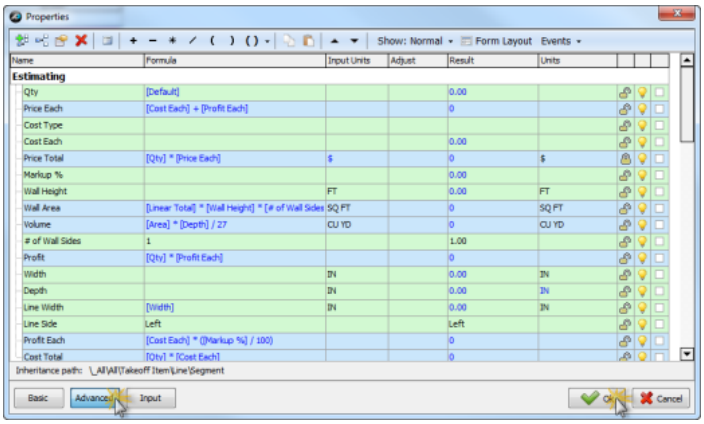
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Segment for your use.



Posted Mike Ramsey - Jul 1, 2010 at 10:33 AM. This article has been viewed 1569 times.

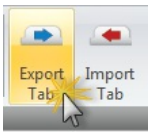
Online URL: http://www.planswift.com/phpkb/article.php?id=394

Export Tab

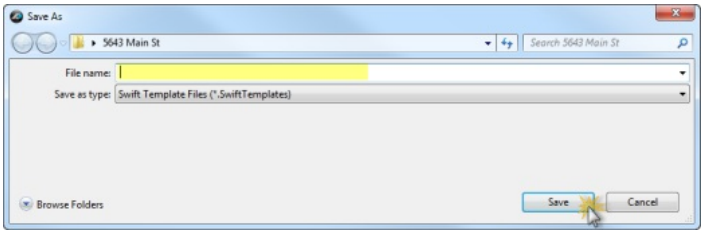
Article Number: 592 | Rating: Unrated | Last Updated: Jul 6, 2010 at 3:23 PM

The Export tab allow you to export tab you have already made from a job to be used later in other jobs.

1. Select the 'Export Tab' to start.



2. Select or navigate to the location you want to export the tab into.
3. Name the tab.
4. Click the 'Save' button to finish export the tab. The window wil close automatically when done.



Posted Mike Ramsey - Jul 6, 2010 at 3:23 PM. This article has been viewed 1462 times.

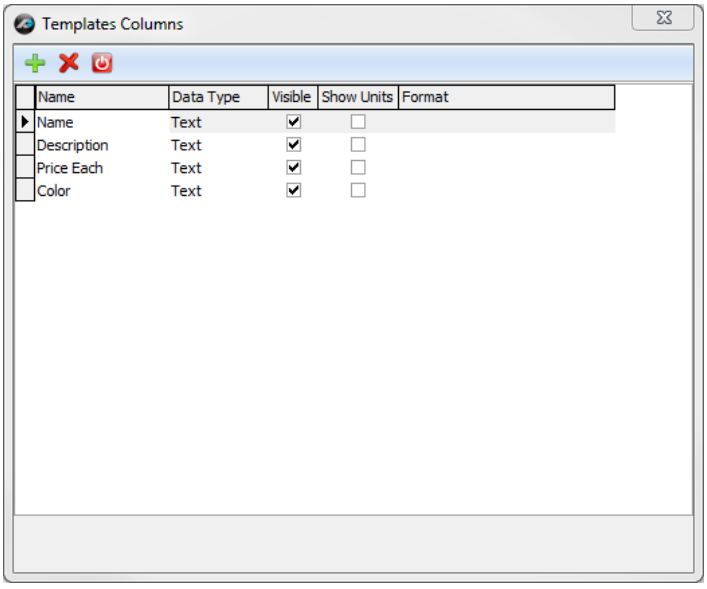
Online URL: http://www.planswift.com/phpkb/article.php?id=592

Templates Columns Button

Article Number: 399 | Rating: Unrated | Last Updated: Jul 27, 2011 at 11:23 AM

The 'Columns' button allows you to update, add and delete columns on your estimating form.

1. Select the 'Columns' button to open the Estimate Columns dialog box.



You can make changes or update directly on the form. Select the item you would like to update and change the information.

To add a column select the plus (1) then enter your information about the column.

To delete a column select the column then select the x (2). The column will be removed from the estimating table.

To close the dialog box select the close button (3). Your changes will be saved and will take effect.

Name - Use this column to give your estimate column a descriptive name.

Date Type - Select the type of data that will be found in this column.

Text - Allows Alphanumeric characters such as letter, numbers, and characters.

Number - Allow number to be input into the cell.

Check box - Creates the cell as a check box allowing a Yes/No selection.

Visible - Do you want the Column to be visible or not visible.

Show Units - Will display units of measure.

Format - Allows you to set how the column contents are formatted and the number of decimal points displayed.

Posted Mike Ramsey - Jul 1, 2010 at 12:08 PM. This article has been viewed 1404 times.

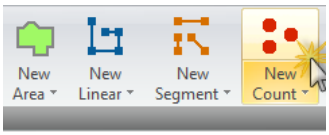
Online URL: http://www.planswift.com/phpkb/article.php?id=399

Template New Count or Sub-Item Count

Article Number: 395 | Rating: Unrated | Last Updated: Jul 27, 2011 at 11:11 AM

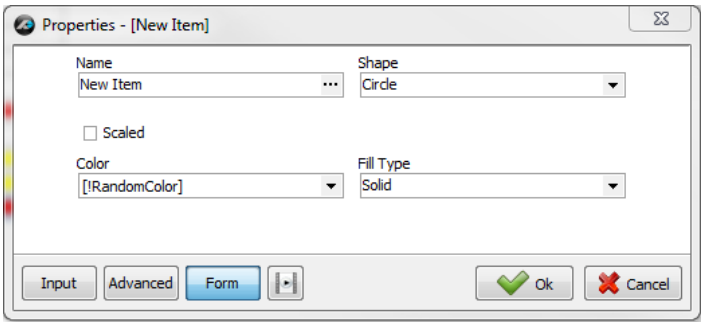
From within the Templates tab you can create a new count for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new count item select the 'New Count' button, to create a new sub-item count select the lower portion of the button.



2. The 'Form' properties window allows you to name your count item, set the shape, size, color, fill and location.

3. When finished click the 'OK' button to continue, you have created a new count item for your use.



4. The 'Advanced' Count option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other count estimating rules for use later.

Item - This section allows you to set general information about the template count including the name and the count type.

Other - Under this section you can set some of the action the count will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

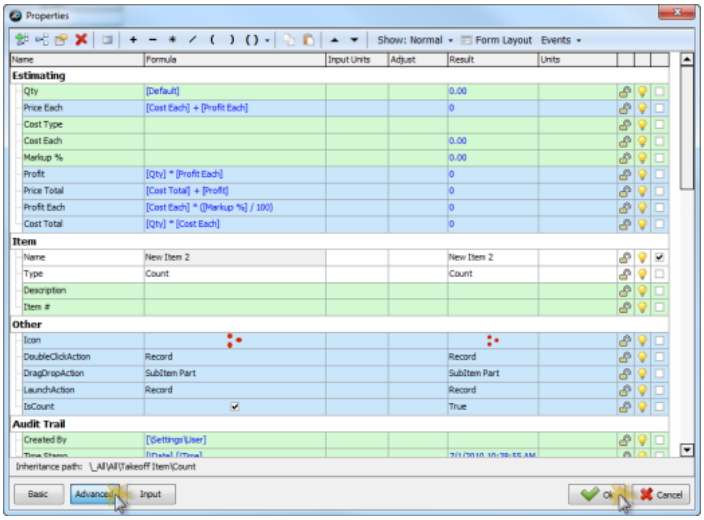
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Count for your use.



Posted Mike Ramsey - Jul 1, 2010 at 10:59 AM. This article has been viewed 1401 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=395

Estimating

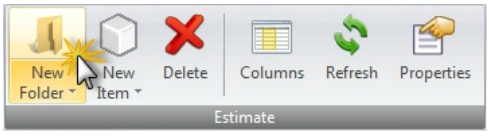
Estimate New Folder

Article Number: 380 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:05 PM

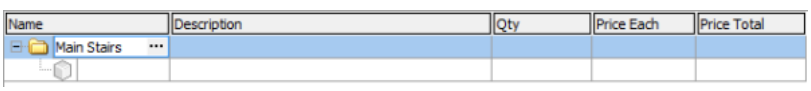
Folders can be a great way to divide estimating items into meaningful groups.

The 'New Folder' button allows you to add a new folder to your estimate, or if you select the lower portion you can add a new sub-folder.

1. Select the 'New Folder' button to begin.



2. You can update the information about the folder directly directly on the estimate table by selecting the square you wish.



You can click the 'New Folder' button as many times as you would like, adding a new folder/sub-folder each time.

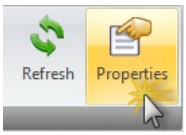
Posted Mike Ramsey - Jun 30, 2010 at 1:39 PM. This article has been viewed 4043 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=380

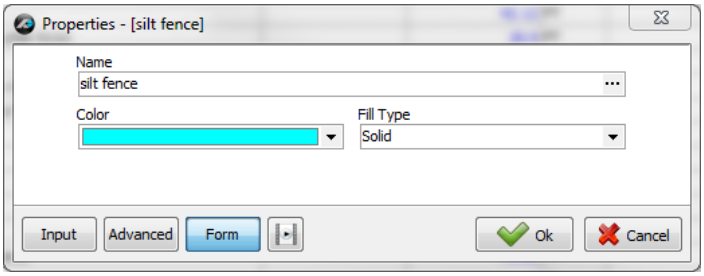
Estimate and Templates Column Properties

Article Number: 387 | Rating: 5/5 from 1 votes | Last Updated: Jul 27, 2011 at 10:05 AM

The 'Properties' button allows you to change, add, or delete estimate column properties, including adding formulas and advance items.



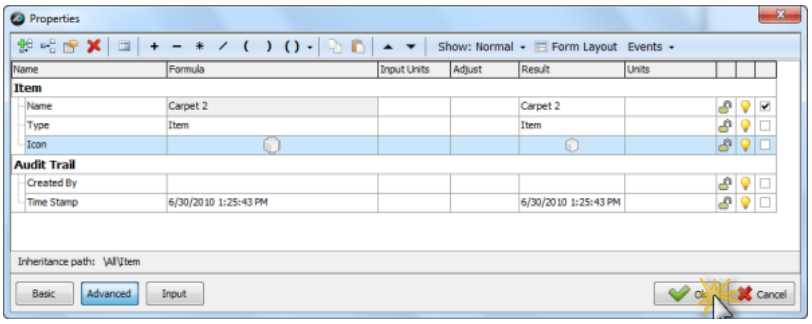
The Form window allows you to change the name of the column.



To make greater changes select the Advanced button.

In the advanced window you can make any change you would want. You can update information, add formulas, and see when the column was changed.

When done click the 'Ok' button to close the window.



Posted Mike Ramsey - Jun 30, 2010 at 2:42 PM. This article has been viewed 3988 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=387

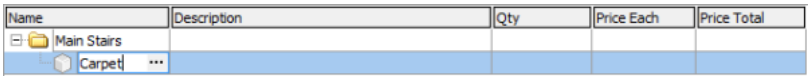
Estimate New Item

Article Number: 382 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:08 PM

The 'New Item' button allows you to add a new item or material to your estimate. By selecting the bottom portion of the button you can add a new sub-item.

1. Select the 'New Item' button.

2. You can update information about the item directly on the estimate table by selecting the cell you want.



Posted Mike Ramsey - Jun 30, 2010 at 1:48 PM. This article has been viewed 3682 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=382

Estimate and Template Adjust Buttons

Article Number: 389 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:29 PM

The 'Adjust' buttons allow you to quickly change the level and sub-level of columns in your estimates.

'Up Arrow' - Moves the selected column up one level.

'Down Arrow' - Moves the selected column down one level.

'Left Arrow' - Moves the selected column up one sub-level.

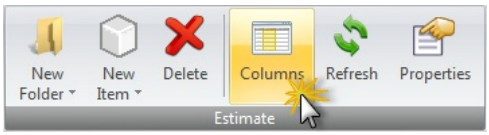
'Right Arrow' - Moves the selected column down one sub-level.

Posted Mike Ramsey - Jun 30, 2010 at 2:54 PM. This article has been viewed 3295 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=389

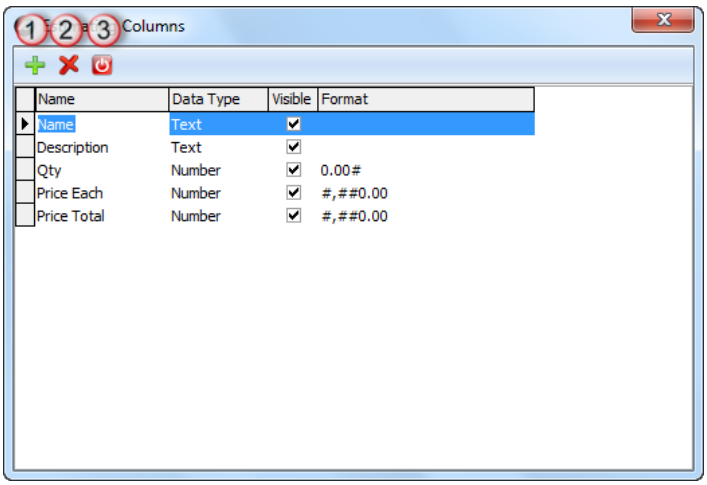
Estimating Columns Options

Article Number: 384 | Rating: 1.5/5 from 2 votes | Last Updated: Jul 6, 2010 at 2:23 PM



The 'Column' button allows you to update, add and delete columns on your estimating form.

1. Select the 'Column' button to open the Estimate Columns dialog box.



You can make changes or update directly on the form. Select the item you would like to update and change the information.

To add a column select the plus (1) then enter your information about the column.

To delete a column select the column then select the x (2). The column will be removed from the estimating table.

To close the dialog box select the close button (3). Your changes will be saved and will take effect.

Name - Use this column to give your estimate column a descriptive name.

Date Type - Select the type of data that will be found in this column.

Text - Allows Alphanumeric characters such as letter, numbers, and characters.

Number - Allow number to be input into the cell.

Check box - Creates the cell as a check box allowing a Yes/No selection.

Visible - Do you want the Column to be visible or not visible.

Format - Allows you to set how the column contents are formatted and the number of decimal points displayed.

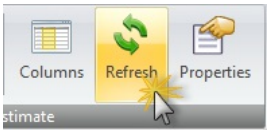
Posted Mike Ramsey - Jun 30, 2010 at 2:15 PM. This article has been viewed 3035 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=384

Estimate and Templates Refresh Button

Article Number: 386 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:24 PM

Use the 'Refresh' button to refresh the screen and estimating numbers with any updates you may have made.

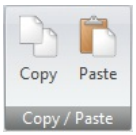


Posted Mike Ramsey - Jun 30, 2010 at 2:24 PM. This article has been viewed 2893 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=386

Copy and Paste Buttons

Article Number: 388 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:27 PM



'Copy' - Copies the selected information to your clipboard.

'Paste' - Copies estimate information from your clipboard.

Posted Mike Ramsey - Jun 30, 2010 at 2:47 PM. This article has been viewed 2805 times.

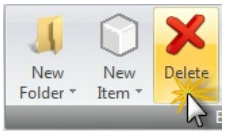
Online URL: http://www.planswift.com/phpkb/article.php?id=388

Estimate Folder and Item Delete

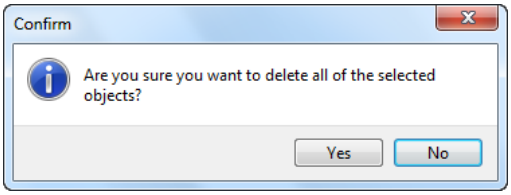
Article Number: 383 | Rating: Unrated | Last Updated: Jul 6, 2010 at 2:10 PM

The 'Delete' button in the estimating tab allow you to delete a folder or item.

1. Select the 'Delete' button.



2. You must confirm you want to delete before it will take effect.



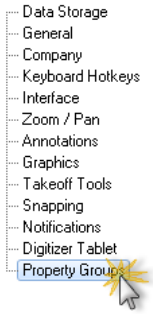
Posted Mike Ramsey - Jun 30, 2010 at 1:55 PM. This article has been viewed 2464 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=383

Settings

Property Groups

Article Number: 582 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:34 PM



Posted Mike Ramsey - Jul 2, 2010 at 10:57 AM. This article has been viewed 1 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=582

New Data Storage

Article Number: 569 | Rating: Unrated | Last Updated: Jun 5, 2012 at 1:16 PM

Creating a new data storage location with PlanSwift is easy. You may create as many storages as you like. These can be Network locations or additional local locations on your pc. You can also use portable hard drives. Special considerations will need to be taken if you plan on using portable a hard drive on

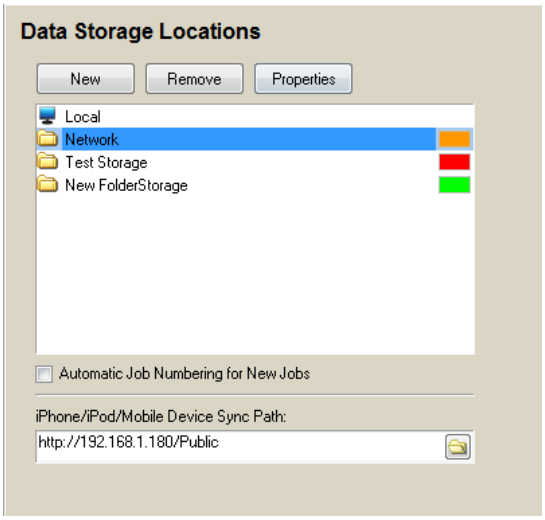
multiple computers. You will need to ensure that the drive letter designation that windows sets is the same on all systems. Documentation on changing drive letters can be found from Microsoft Here.

---

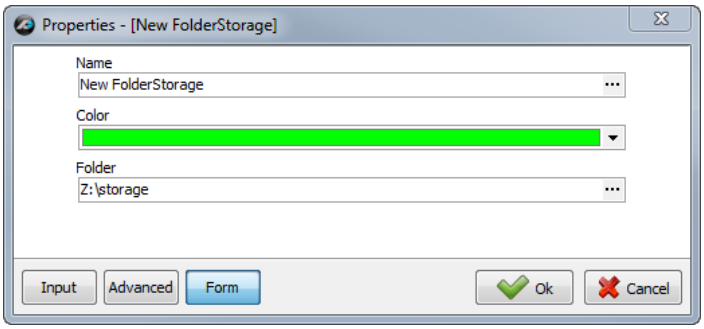
1. Select the 'Data Storage' option.

2. Click 'New' to select a new storage location

   Note: From this location you can also set the path to your iPhone/iPod.



3. Enter the storage folder name and either enter the folder location or navigate to the folder location by clicking on the ellipsis button. Click 'Finish' when you are done.



Important Note: This directory must remain in a clean state. Do Not add additional files or folders to this directory through Windows Explorer.
PlanSwift Storages should only be modified by the PlanSwift Application

Multiple storages can be placed into a Parent directory as follows, this is the only acceptable method.

- **Parent Directory (Do Not define this directory as a storage!!)**
  - Storage 1 (defined as a storage from PlanSwift)
  - Storage 2 (Also defined as a storage from PlanSwift)
  - Storage 3 (Also defined as a storage from PlanSwift)

DO NOT ATTEMPT MULTIPLE STORAGES LIKE THIS *- Catastrophic results will happen*

- **Parent Storage**
  - **Storage 2**
    - **storage 3**

Posted Mike Ramsey - Jul 1, 2010 at 3:50 PM. This article has been viewed 2965 times.

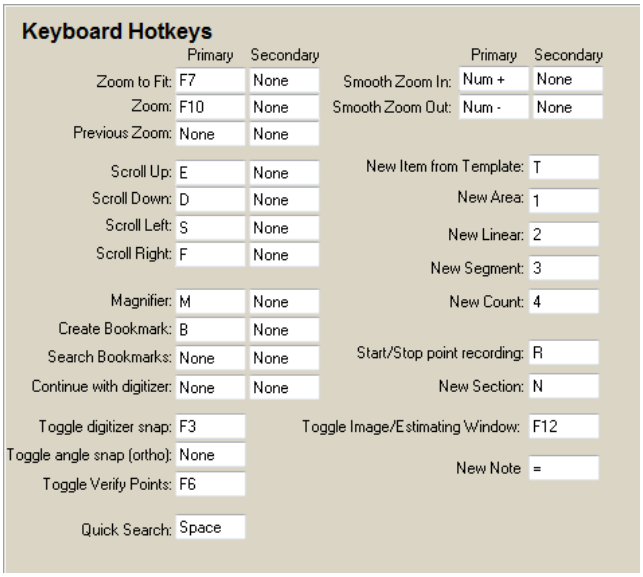
Online URL: http://www.planswift.com/phpkb/article.php?id=569

Keyboard Hotkeys

Article Number: 573 | Rating: Unrated | Last Updated: Jun 8, 2012 at 3:59 PM

Keyboard Hotkeys allow you to make quick one key selections of tasks you do often.

PlanSwift comes with many already set hotkeys however you may update and change then as you like. For some options you may select two different hotkeys.



Hotkeys that are not listed on the Keyboard Hotkey settings page:

Copy:	**Ctrl + C**
Paste:	**Ctrl + V**
Undo:	**Ctrl + Z**
Next Page:	**Page Down**
Previous Page:	**Page Up**
Select All Items between first and last click:	**Shift + click** (on last item)
Select multiple items in random order:	**Ctrl + click**
Start the Arc tool:	**A**
Close an Area or a Linear:	**C**
Delete an item:	**Delete**
End recording:	**Esc**
Move selected items (digitized):	**Alt** (hold the alt key down after selecting the items and drag)
Rotate Point Counts:	**O** (rotates the last placed point count or all selected point counts 90 degrees)
Undo the last digitized node:	**Backspace**
Zoom to selected objects (digitized):	**F5**

Posted Mike Ramsey - Jul 1, 2010 at 5:32 PM. This article has been viewed 2940 times.

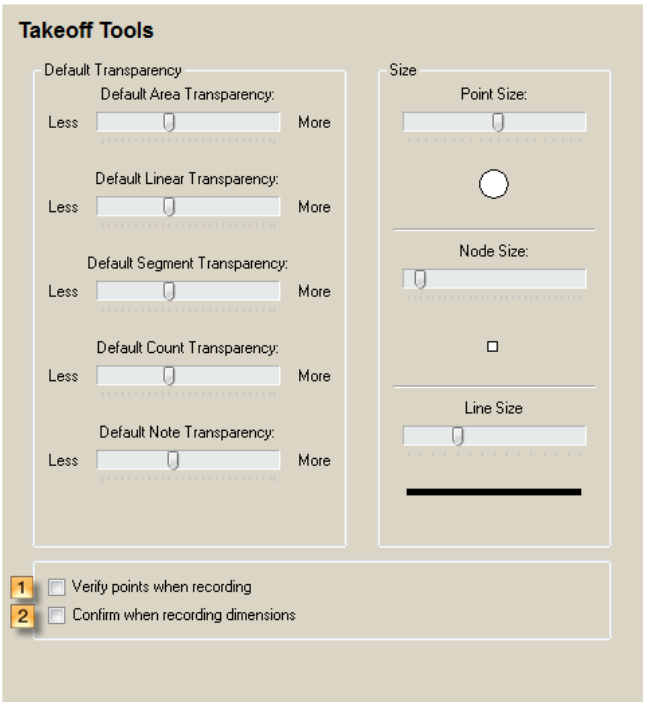
Online URL: http://www.planswift.com/phpkb/article.php?id=573

Takeoff Tools Settings

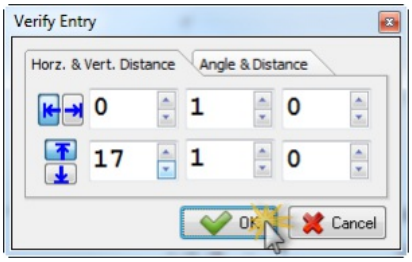
Article Number: 578 | Rating: Unrated | Last Updated: Jul 27, 2011 at 2:05 PM

The Takeoff Tools setting allows you to set defaults for when you do takeoffs.

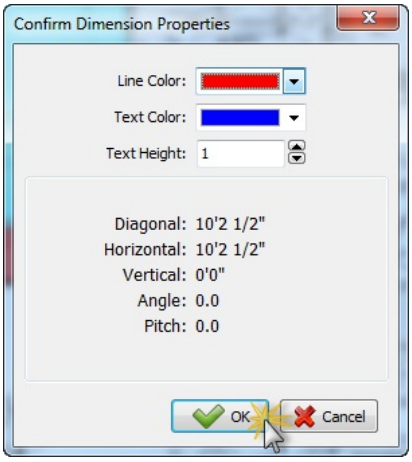
1. When checked will require you to verify your points before recording with the Verify Entry Box.
2. When checked will require you to verify the dimension properties before continuing.



Sample verify points confirmation box. You much clicking 'OK' to verify and continue.



Sample dimension confirmation box. You much click 'OK' to verify the dimensions and continue.



Posted Mike Ramsey - Jul 2, 2010 at 9:50 AM. This article has been viewed 2838 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=578

General Settings

Article Number: 571 | Rating: Unrated | Last Updated: Jul 27, 2011 at 12:53 PM

The General Settings page allows you to make several choices about your overall settings in PlanSwift.

Select 'General' from the list.

1. When checked will automatically open the last job you had open the next time you open PlanSwift.

2. When checked will automatically open to the first page of a job when you open that job in PlanSwift.

3. When checked will automatically open to the last view you have open the next time you open that job.

4. When checked will automatically remove the PlanSwift license when you exit the program.

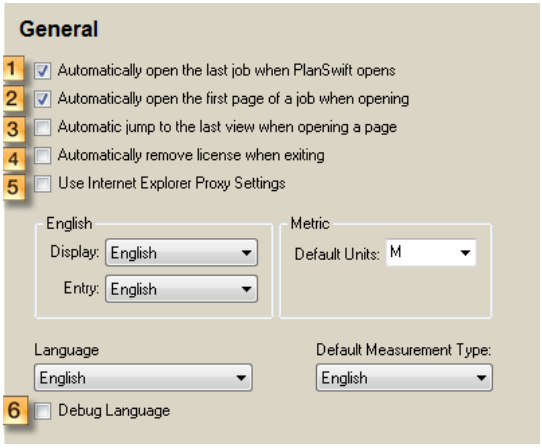
5. When checked will use the proxy settings from Internet Explorer for the network address of the intermediary server that is used between the browser and the Internet.

6. Only applies to Beta version

English - Select Display and Entry units is either English or FIS.

Metric - Select the default unit of metric measurement mm/cm/m/km.

Language - Select the language PlanSwift should display.



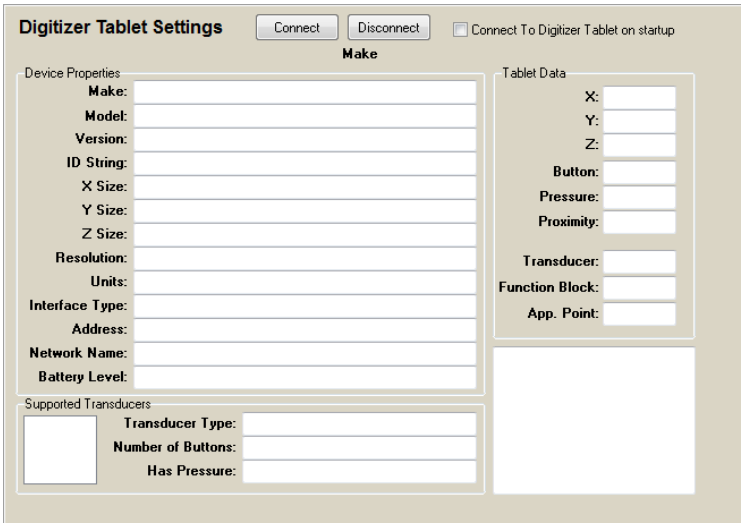
Posted Mike Ramsey - Jul 1, 2010 at 5:14 PM. This article has been viewed 2192 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=571

Digitizer Tablet Settings

Article Number: 581 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:33 PM

This selection allows you to set your digitizer tablet connection options so PlanSwift can easily connect directly to your digitizer.



Posted Mike Ramsey - Jul 2, 2010 at 10:48 AM. This article has been viewed 2073 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=581

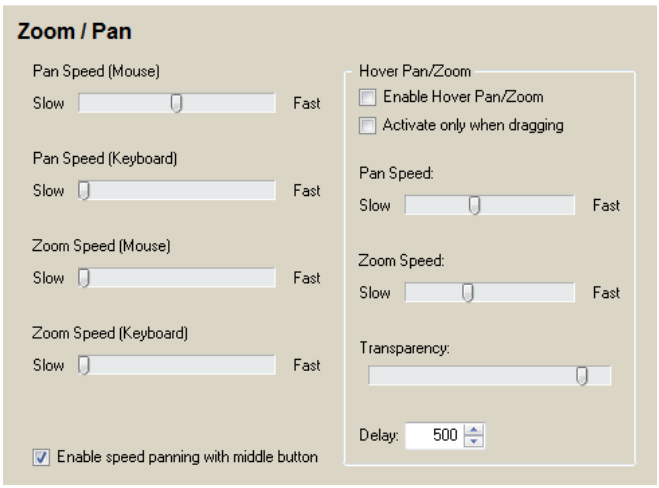
Zoom and Pan Options

Article Number: 575 | Rating: 3/5 from 1 votes | Last Updated: Mar 1, 2012 at 3:15 PM

The Zoom/Pan selection allows you to set option about the Speed and look of Zoom/Pan features..

Pan Speed - Mouse and Keyboard sets the speed panning occurs at.

Zoom Speed - Mouse and Keyboard sets the speed zooming occurs at.



To pan with the mouse simply click and hold the right mouse button while dragging the page. The Middle mouse button, if your mouse has one, will allow for rapid panning in the same manor as the right click pan option.

Posted Mike Ramsey - Jul 2, 2010 at 8:12 AM. This article has been viewed 1869 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=575

Data Storage Locations Deleting and Properties

Article Number: 570 | Rating: Unrated | Last Updated: Jul 26, 2011 at 2:37 PM

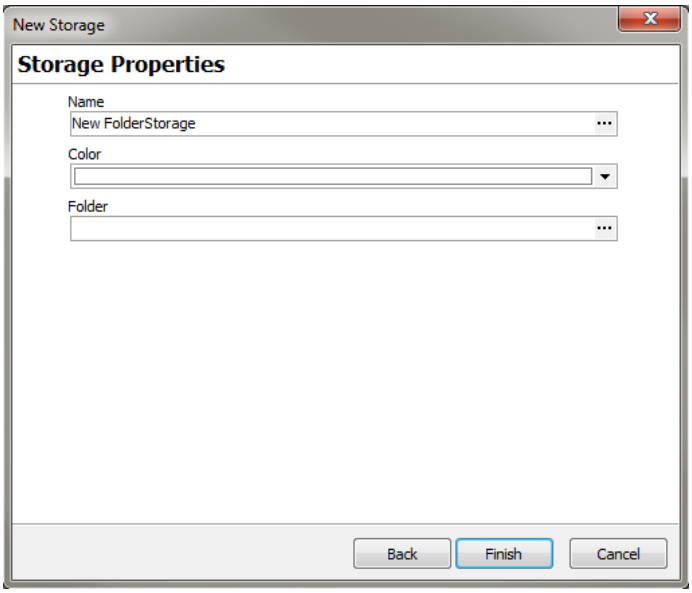
You can easily change your data storage properties or delete a location from within the setting tab.

1. Select 'Data Storage' from the list.

2. To Delete a location select the location then the 'Remove' button.

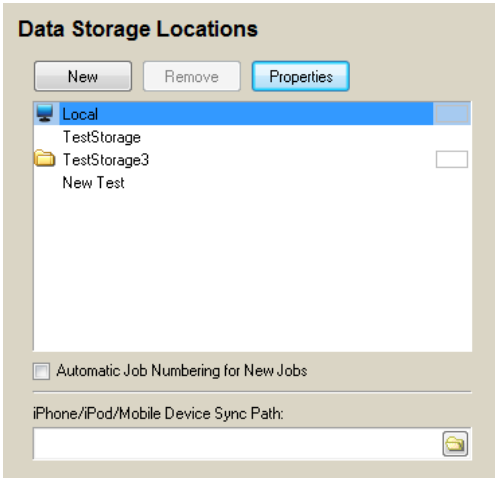
And to add a new location, click on the 'New' button, which will open the 'New Storage' window where you can enter a name for the location and choose a destination for that new location.

You can also select a color for the storage.



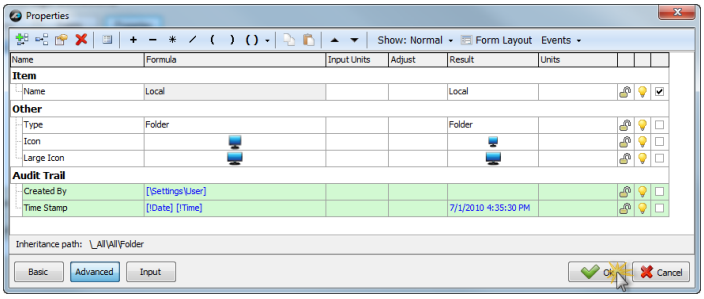
3. Confirm your choice then the location will be added or deleted.

4. To see the data location properties select the 'Properties' button.



5. You can make some changes from the Advanced Properties Box.

6. When complete click the 'OK' button to close the box. Any changes you have made will take effect at this time.



Posted Mike Ramsey - Jul 1, 2010 at 4:41 PM. This article has been viewed 1813 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=570

Annotations Settings

Article Number: 576 | Rating: Unrated | Last Updated: Jul 27, 2011 at 1:35 PM

The Annotation Settings allow you to set the default options for your annotations.

These defaults can be overridden when selecting them for use in pages.

'Default Label Settings' - Allows you to set the default look and feel of labels including font, text height, color and transparency.

'Default Note Settings' - Allows you to set the default look and feel of notes including font, text height, color and transparency.

'Default Dimension Settings' - Allows you to set the default look and feel of dimensions including font, text height and color.

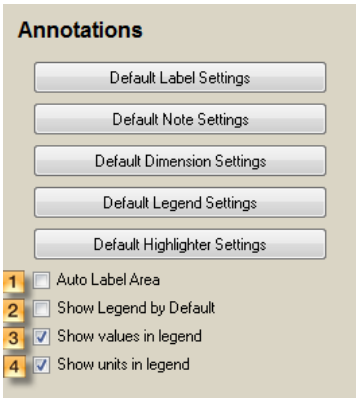
'Default Legend Settings' - Allows you to set the default look and feel of legend including font, color and transparency.

1. When checked will automatically label area for you as you create them.

2. When checked will show plan legend by default, however this can be changed if you prefer.

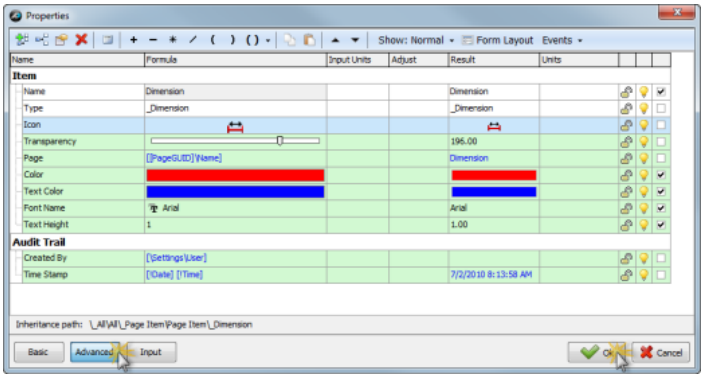
3. When checked will display values in the legend.

4. When checked will display units in the legend.



The Advanced Properties window allow you to set the details about the Annotations.

When complete click the 'OK' button to save and close the window.



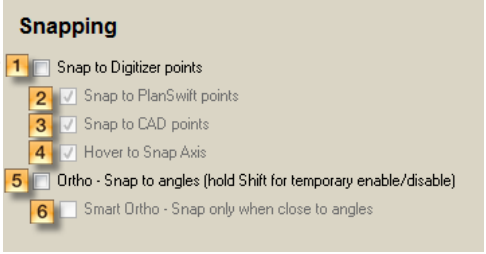
Posted Mike Ramsey - Jul 2, 2010 at 8:24 AM. This article has been viewed 1612 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=576

Snapping Settings

Article Number: 579 | Rating: 1/5 from 1 votes | Last Updated: Jul 27, 2011 at 2:44 PM

The Snapping settings allow you to set how and when the snapping feature works on PlanSwift.


Snapping
1 Snap to Digitizer points
2 Snap to PlanSwift points
3 Snap to CAD points
4 Hover to Snap Axis
5 Ortho - Snap to angles (hold Shift for temporary enable/disable)
6 Smart Ortho - Snap only when close to angles

1. Check this option to enable all selected snap options.
2. This will snap only to points created by the PlanSwift digitizers.
3. This will enable PlanSwift to snap to points created in CAD files.
4. This option enables you to snap to a point but if you hover at that point for a second or two the red snap box will turn green thus locking on that axis.
5. Ortho will lock the digitizer on the 90 and 45 degree axis.
6. this option allows a bit more refinement only snapping to the 90 and 45 degree axis when you are within a few degrees of them.

Posted Mike Ramsey - Jul 2, 2010 at 10:23 AM. This article has been viewed 1611 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=579

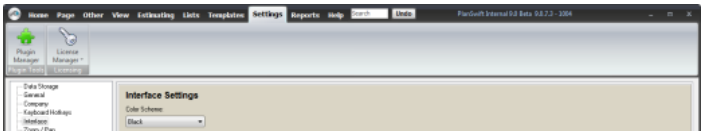
Interface

Article Number: 574 | Rating: Unrated | Last Updated: Jul 27, 2011 at 1:13 PM

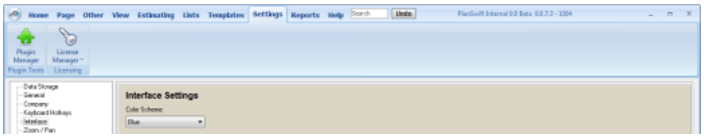
The Interface list selection allows you to select several option about the look and feel of PlanSwift.

Color Scheme allows you to pick the colors you prefer, Black, Blue or Silver.

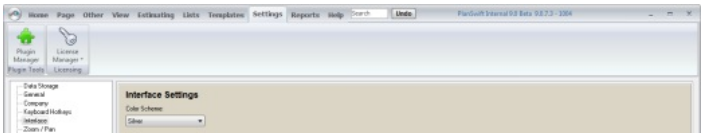
Black



Blue



Silver



1. When checked shows the Under the Hood Screen Tab. This allows access to some of the internal settings of PlanSwift, although you may need to make changes here it is advisable to work with professionals when "Under The Hood".

2. When checked will show the Types tab in Templates.

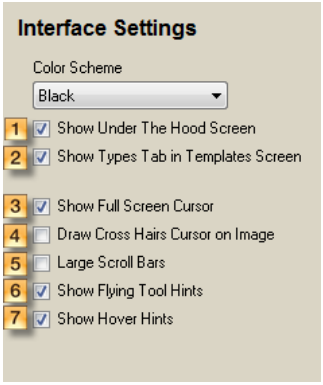
3. When checked will show a full screen cursor rather than a smaller one.

4. When checked will cause the cross hairs to be displayed on your plan images.

5. When checked will show large scroll bars rather than smaller ones.

6. When checked will show you tool hints.

7. When checked will show you digitized information.


Interface Settings
Color Scheme
Black
1 Show Under The Hood Screen
2 Show Types Tab in Templates Screen
3 Show Full Screen Cursor
4 Draw Cross Hairs Cursor on Image
5 Large Scroll Bars
6 Show Flying Tool Hints
7 Show Hover Hints

Posted Mike Ramsey - Jul 2, 2010 at 8:02 AM. This article has been viewed 1496 times.

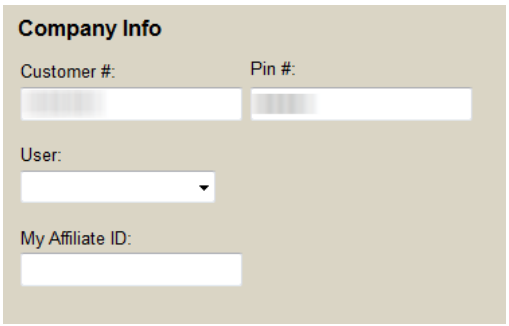
Online URL: http://www.planswift.com/phpkb/article.php?id=574

Company Information Settings

Article Number: 572 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:31 PM

From the Company Info tab you can enter information specific to you and your company.

From the 'Company' list selection you can update your customer number, pin number, user name, and affiliate ID.



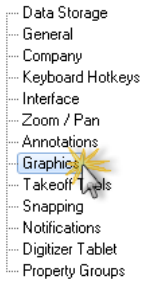
Posted Mike Ramsey - Jul 1, 2010 at 5:22 PM. This article has been viewed 1374 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=572

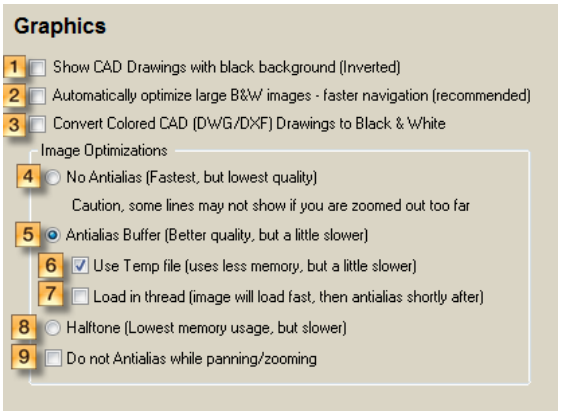
Graphic Settings

Article Number: 577 | Rating: Unrated | Last Updated: Jul 27, 2011 at 2:01 PM

The Graphic settings section allow you to set some default graphic options for all plans.



1. When checked optimizes large black and white images allowing for faster navigation.
2. When checked will show CAD drawing with a black background.
3. When checked will automatically convert colored CAD drawings into black and white plans.
4. When checked will enhance anti-aliasing of your image to allow for a better quality image.


Graphics
1 Show CAD Drawings with black background (Inverted)
2 Automatically optimize large B&W images - faster navigation (recommended)
3 Convert Colored CAD (DWG/DXF) Drawings to Black & White
Image Optimizations
4 No Antialias (Fastest, but lowest quality)
Caution, some lines may not show if you are zoomed out too far
5 Antialias Buffer (Better quality, but a little slower)
6 Use Temp file (uses less memory, but a little slower)
7 Load in thread (image will load fast, then antialias shortly after)
8 Halftone (Lowest memory usage, but slower)
9 Do not Antialias while panning/zooming

Posted Mike Ramsey - Jul 2, 2010 at 9:39 AM. This article has been viewed 1214 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=577

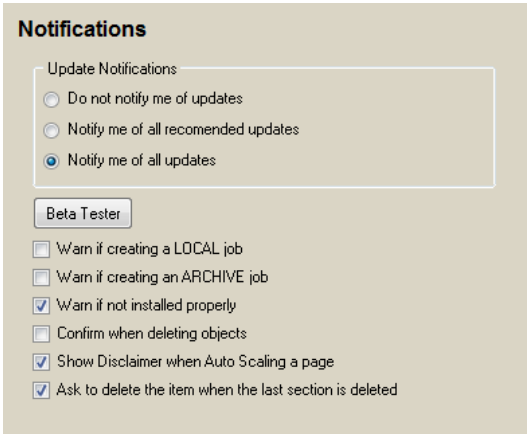
Notification Settings

Article Number: 580 | Rating: Unrated | Last Updated: Jul 28, 2011 at 9:42 AM

The Notification settings allows you to set how you will be alerted of PlanSwift updates.

You can select not to be notified, to always be notified or notified only when recommended updates are available.

You can also check for updated at anytime under the HELP tab and Automatic Updates.


Notifications
Update Notifications
Do not notify me of updates
Notify me of all recomended updates
Notify me of all updates
Beta Tester
Warn if creating a LOCAL job
Warn if creating an ARCHIVE job
Warn if not installed properly
Confirm when deleting objects
Show Disclaimer when Auto Scaling a page
Ask to delete the item when the last section is deleted

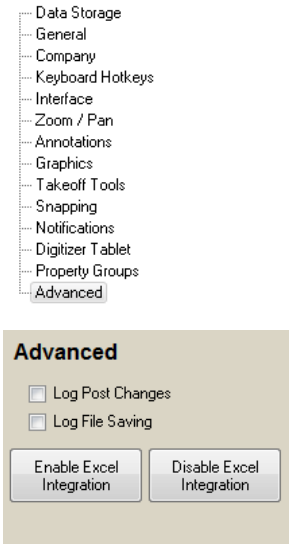
Posted Mike Ramsey - Jul 2, 2010 at 10:30 AM. This article has been viewed 999 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=580

Advanced

Article Number: 1811 | Rating: Unrated | Last Updated: Jul 28, 2011 at 10:40 AM

These options are utilized by Technical Support for trouble shooting purposes.



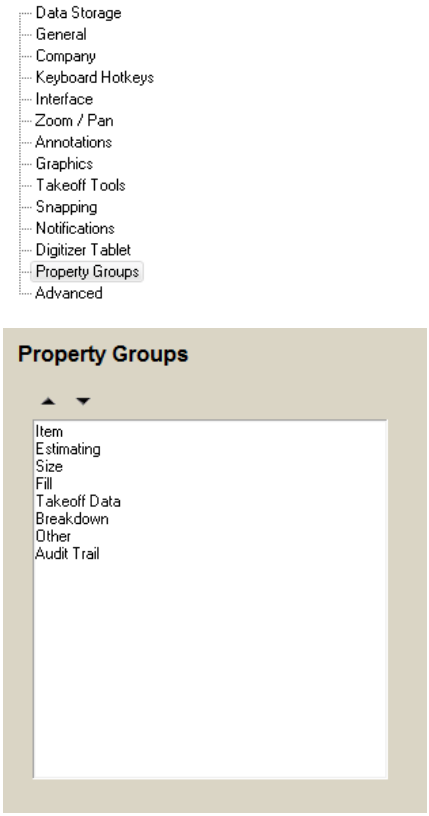
Posted Mike Ramsey - Jul 28, 2011 at 10:40 AM. This article has been viewed 942 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1811

Property Groups

Article Number: 1810 | Rating: Unrated | Last Updated: Jul 28, 2011 at 10:07 AM

This allows you to edit the order that Property Groups appear in an advanced property window view.



Posted Mike Ramsey - Jul 28, 2011 at 10:07 AM. This article has been viewed 889 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1810

Under the Hood

There are no articles under this category.

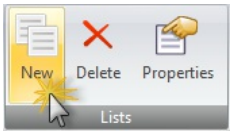
Lists

New List

Article Number: 597 | Rating: Unrated | Last Updated: Sep 10, 2010 at 5:13 PM

Lists allow you to create drop down menus for lists of items you need to enter repetitively (i.e. stud sizes).

1. Select the 'New' list button



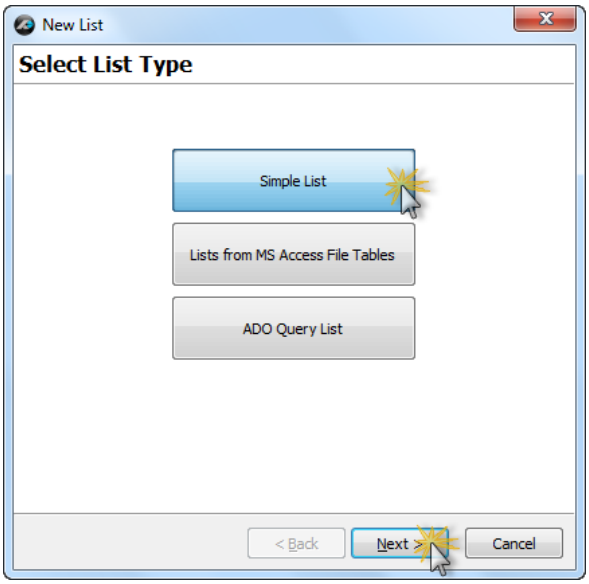
2. Select the type of list.

    Simple List - You will input the list option.

    List from MS Access File Tables - List choices will come from a Microsoft Access database.

    ADO Query List - List choices will come from a query list.

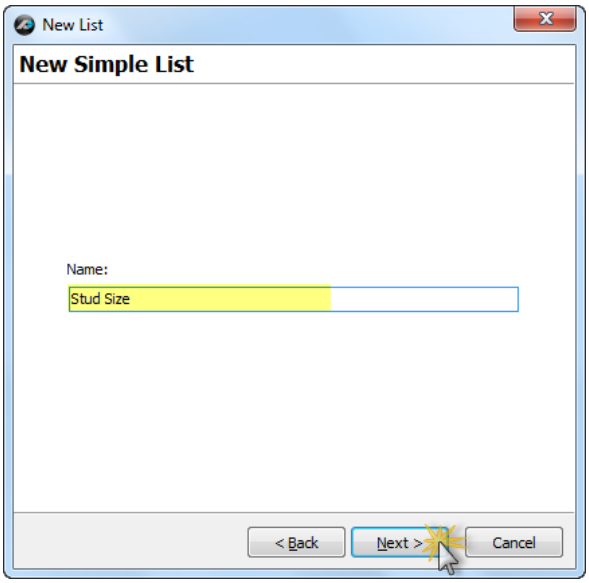
3. Select 'Next' to continue.



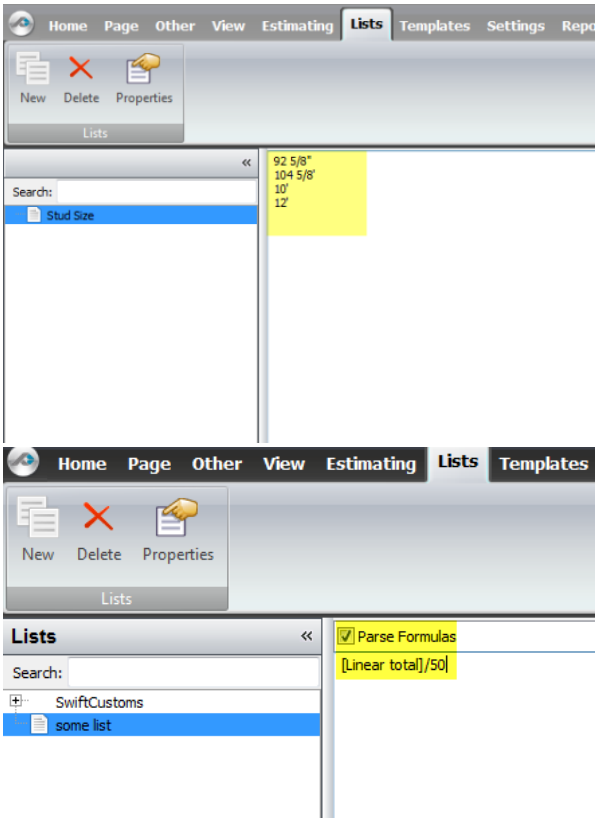
Simple List

4. Enter the Name for the List, this is the name you will use in item Properties.

5. Click 'Next' to continue.



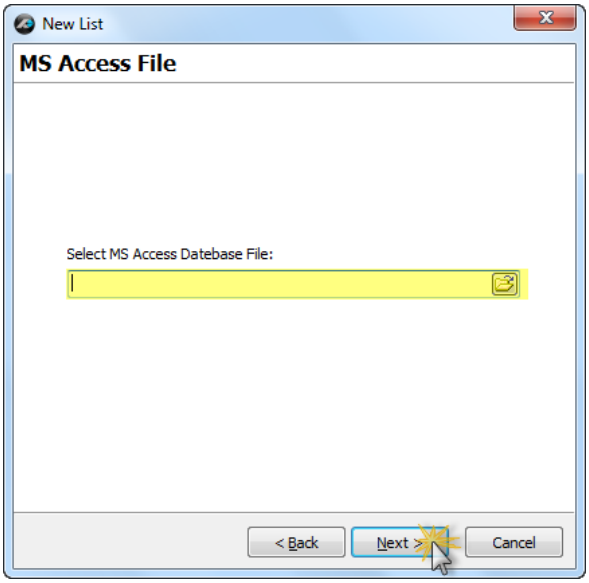
6. Enter the values you want in the drop-down list. Your list will be saved and available to you when you are done entering choices. If you are using formulas you must check the Parse Formulas box as in the second image.



MS Access File Table

4. Enter or navigate to the file containing the database.

5. Click 'Next' to continue. All the tables from the database will be made available as a list selection.

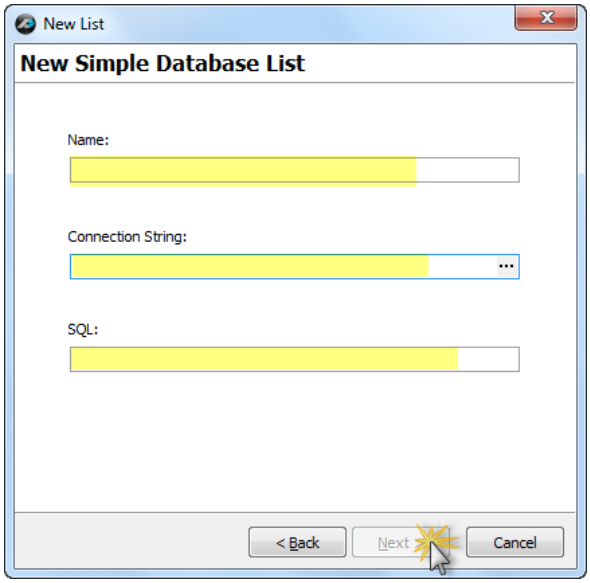


ADO Query List

4. Enter the name you want to use to reference this database, this is the name you will use in properties later.

5. Enter the Connection String and SQL.

6. Click the 'Next' button to complete the database connection.



Posted Mike Ramsey - Jul 7, 2010 at 11:52 AM. This article has been viewed 2872 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=597

List Properties

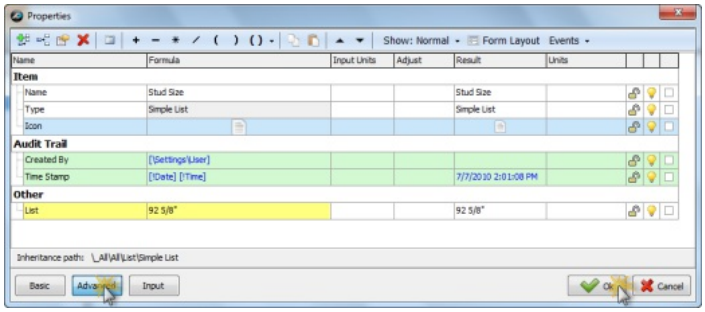
Article Number: 599 | Rating: Unrated | Last Updated: Jul 7, 2010 at 2:42 PM

The list Properties button gives you access to the many property of the selected list.

1. Select the 'Properties' button.

2. From the list properties window you can view and change many of the properties of the list. By selecting the List row you can add, change and delete list choices.

3. When finished click the 'OK' button to close the window.



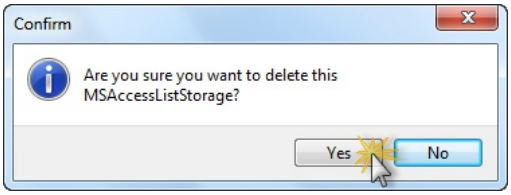
Posted Mike Ramsey - Jul 7, 2010 at 11:58 AM. This article has been viewed 2022 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=599

List Delete

Article Number: 598 | Rating: Unrated | Last Updated: Jul 7, 2010 at 11:56 AM

The 'Delete' button allows you to delete lists you have made. You will be required to confirm you choice before the deletion will take effect.



Posted Mike Ramsey - Jul 7, 2010 at 11:56 AM. This article has been viewed 1198 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=598

View

Show/Hide Option Buttons

Article Number: 378 | Rating: Unrated | Last Updated: Jul 6, 2010 at 1:52 PM

'Show Labels' - Displays labels on the page.

'Hide Labels' - Hides labels on the page from view.

'Show Digitizer Items' - Shows items used by the digitizer.

'Hide Digitizer Items' - Hides from view the items used by the digitizer.

'Show Overlays' - Displays plan page overlays.

'Hide Overlays' - Removed overlay page from view.

'Show Dimensions' - Displays dimensions on the page.

'Hide Dimensions' - Hides from view dimensions on the page.

'Show Notes' - Displays notes on the page.

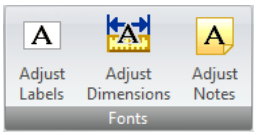
'Hide Notes' - Hides from view notes on the page.

Posted Mike Ramsey - Jun 30, 2010 at 12:45 PM. This article has been viewed 1894 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=378

Font Adjust Buttons

Article Number: 379 | Rating: Unrated | Last Updated: Jul 6, 2010 at 1:55 PM



These button allow you to adjust the font, height, colors and transparency of fonts on your job pages.

'Font' - Select the font style you want to use.

'Height' - Select the font height.

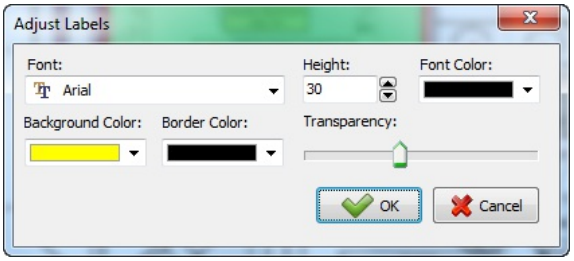
'Font Color' - Select the color the font will be.

'Background Color' - Select the color to use as background.

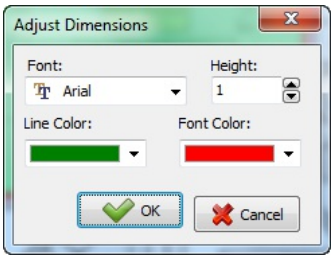
'Transparency' - Set the amount of transparency the font will have when available.

When done click the 'OK' button to activate the settings.

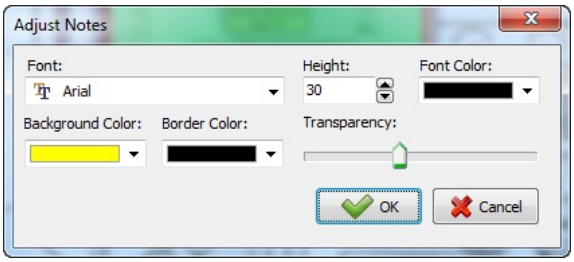
'Adjust Labels'



'Adjust Dimensions'



'Adjust Notes'



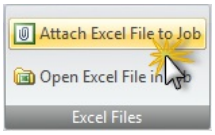
Posted Mike Ramsey - Jun 30, 2010 at 1:00 PM. This article has been viewed 1227 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=379

Other

Attach Excel File to Job Tool

Article Number: 373 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:27 PM

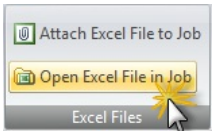


Posted Mike Ramsey - Jun 30, 2010 at 11:40 AM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=373

Open Excel File in Job Tool

Article Number: 374 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:27 PM



Posted Mike Ramsey - Jun 30, 2010 at 11:41 AM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=374

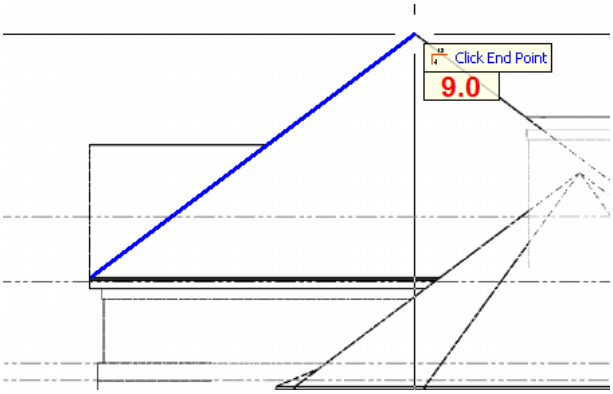
Pitch Calculation Tool

Article Number: 366 | Rating: Unrated | Last Updated: Aug 18, 2011 at 10:29 AM

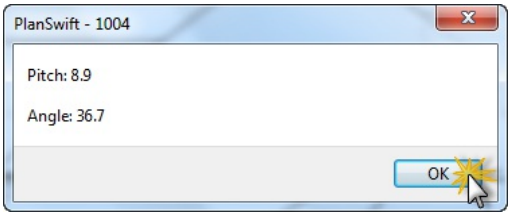
The Pitch tool allows you to find the pitch and angle of a slope.

1. Select the 'Pitch' button.

2. Click on the first point of the slope you want to measure.
3. Click on the second point of the slope.



4. A window will appear with the both the pitch and slope of the line you just made.
5. To close the box click the 'Ok' Button.



Posted Mike Ramsey - Jun 30, 2010 at 9:04 AM. This article has been viewed 3406 times.

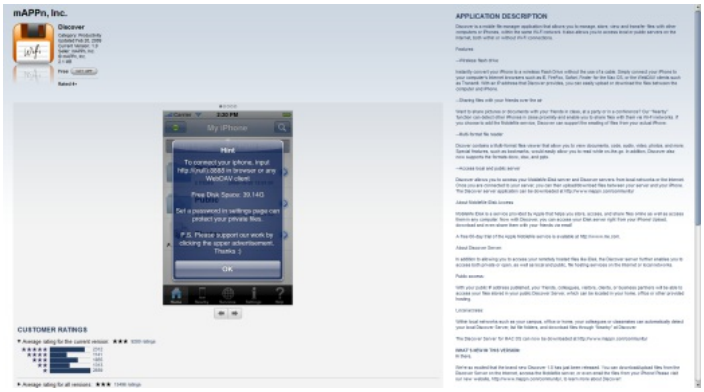
Online URL: http://www.planswift.com/phpkb/article.php?id=366

Download to Mobile Device

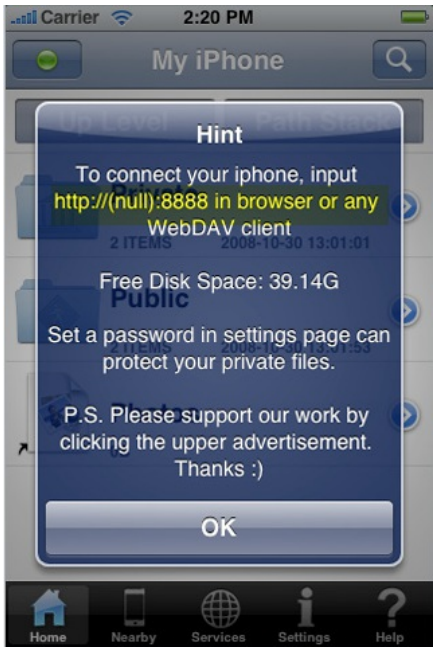
Article Number: 370 | Rating: 1/5 from 1 votes | Last Updated: Jul 19, 2010 at 4:21 PM

PlanSwift makes it easy for you to download your plans to your mobile device allowing you to take your plans with you when away from your computer.

To do this you will need a wireless connection and the Discover app from mAPPn, Inc.

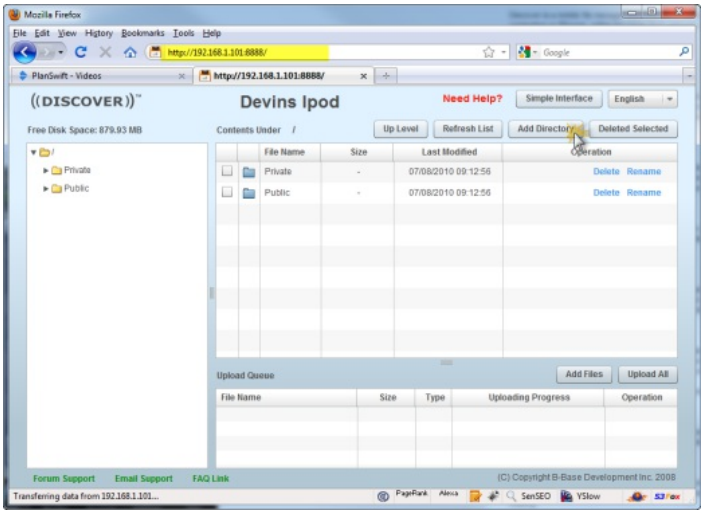


1. Run the Discover app on you device you will need to copy the IP address from the Hint page. The Hint page come up when you start the app or by selecting the Green Dot button.



2. Copy the Device IP address into your web browser.

3. Click the 'Add Directories' button to add a PlanSwift directory.



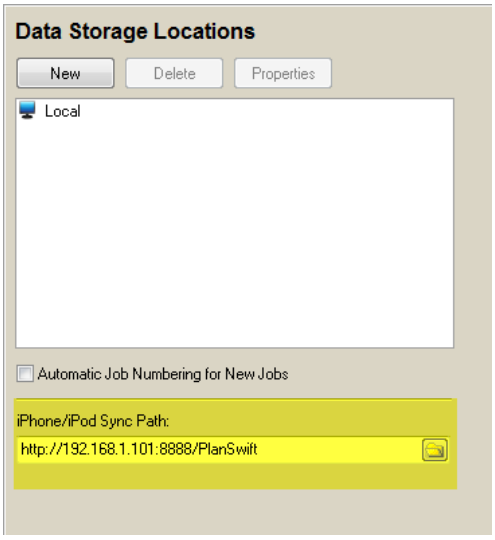
4. Enter the Directory name.

5. Click the 'Accept' button to create the directory.

6. Confirm the new directory has been added.

6. Add the iPhone/iPod IP address to PlanSwift. This is done under the 'Settings' tab, Data Storage Locations.

Make sure to include the directory name in the path.



7. Select the 'Download to Mobile Device' button.

8. Select the pages to be downloaded by selecting the check box.

'Select All' - Will select all the pages in the current job.

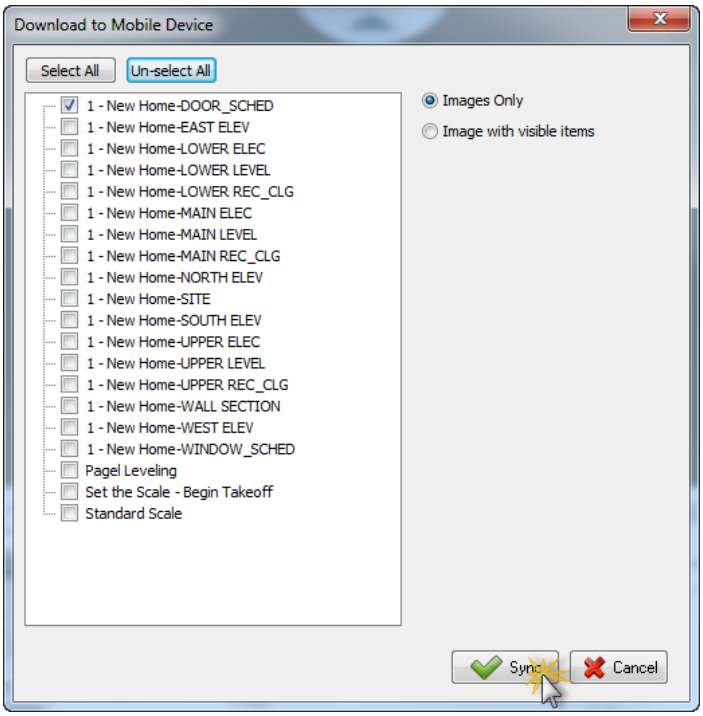
'Un-select All' - Will un-select all the pages in the current job.

9. Select the Image information to downloaded.

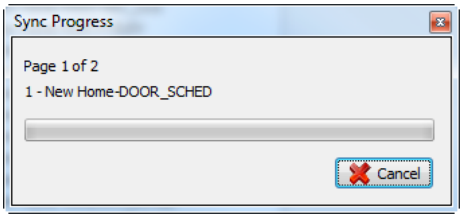
Images Only - Downloads only the page images **without** any items you have added.

Images with visible items - Downloads the pages **with only** the items you have selected as visible on the page. Invisible items will not be downloaded.

10. Click 'Sync' to download the pages to your device.


Download to Mobile Device
Select All
Un-select All
1 - New Home-DOOR_SCHED
1 - New Home-EAST ELEV
1 - New Home-LOWER ELEC
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Set the Scale - Begin Takeoff
Standard Scale
Images Only
Image with visible items
Sync
Cancel

PlanSwift will show you the progress of your download. Depending on the size of your download and speed of your connection this could take some time.



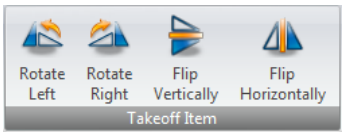
11. Open the Discover app on your iPhone/iPod and navigate to the PlanSwift directory. There you will find the plans you have downloaded.

Posted Mike Ramsey - Jun 30, 2010 at 10:23 AM. This article has been viewed 2945 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=370

Takeoff Item

Article Number: 365 | Rating: Unrated | Last Updated: Jul 19, 2010 at 4:18 PM



The Digitizer Item buttons allow you to work with a selected digitizer area.

First you must select the digitizer area you wish to work with.

'Rotate Left' - Rotates the digitizer area count-clockwise.

'Rotate Right' - Rotates the digitizer area clockwise.

'Flip Vertically' - Flips the digitizer area so the bottom is now at the top.

'Flip Horizontally' - Flips the digitizer area so the left side is now on the right.

Posted Mike Ramsey - Jun 30, 2010 at 8:57 AM. This article has been viewed 2072 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=365

Triangulate Calculations Tool

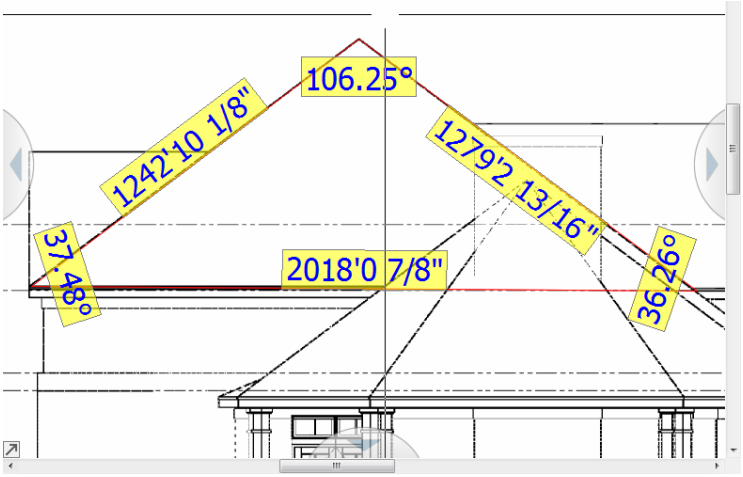
Article Number: 367 | Rating: Unrated | Last Updated: Jul 22, 2010 at 9:48 AM

The Triangulate tool allows you to measure the angles and side lengths of any triangle.

1. To use select the 'Triangulate' button.

2. Click on the three points of the triangle you want to measure.

3. The measurements will automatically be shown.



Also, you can use this tool to find an unknown dimension with two known points. To do this, click on the two known points and the unknown dimension. This will show you how far away the unknown dimension is from the two known points.

Posted Mike Ramsey - Jun 30, 2010 at 9:24 AM. This article has been viewed 1832 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=367

Save Screenshot Tool

Article Number: 375 | Rating: Unrated | Last Updated: Jul 19, 2010 at 4:17 PM

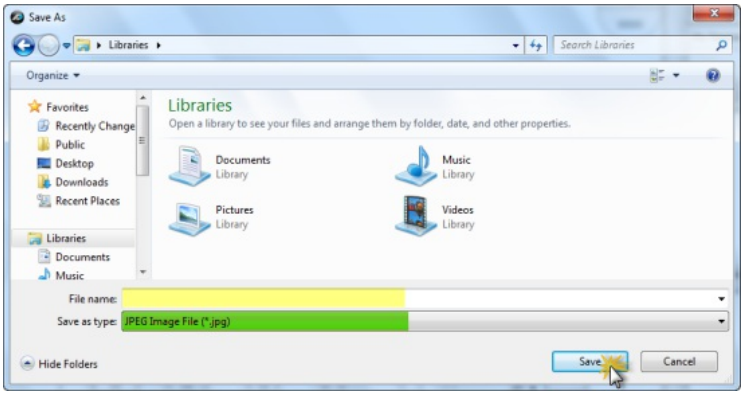
The Save Screenshot tool allows you to capture and save an image screenshot for later use.

1. Select the 'Save Screenshot' button.

2. Enter or browse to the location you want to save the screenshot to.

3. Select the file type you want. You can select from the most common types jpg, jpeg, tif, or bmp.

4. Click the 'Save' button to save the screenshot. The window will automatically close when the process is complete.



Posted Mike Ramsey - Jun 30, 2010 at 11:49 AM. This article has been viewed 1691 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=375

PDF to TIF Converter Tool

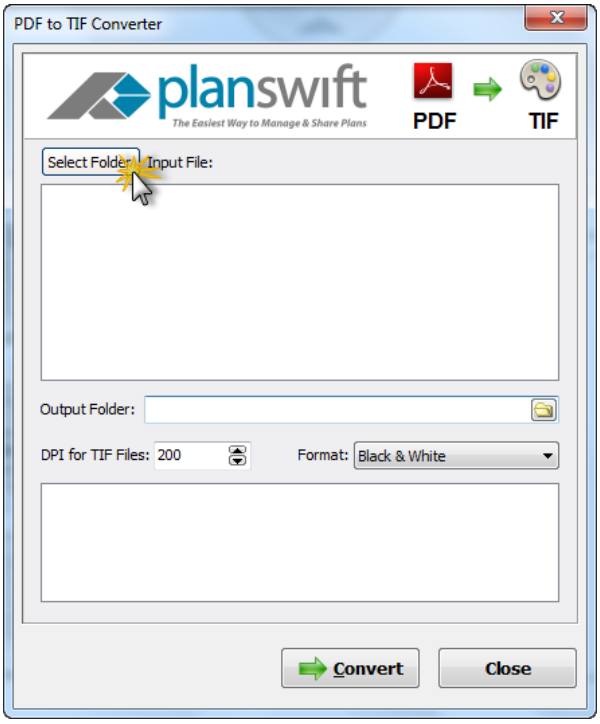
Article Number: 368 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:27 PM

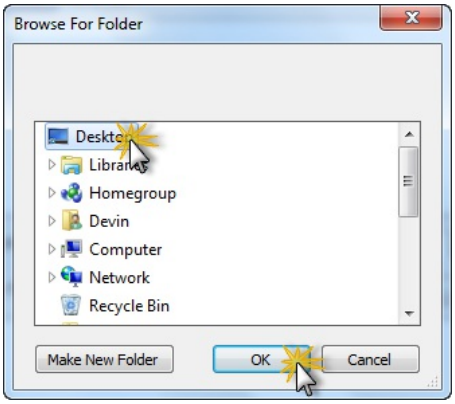
The PDF to TIF converter makes is easy to convert one or more PDF files into TIFs.

1. Select the 'PDF to TIF Converter' button.

2. Select 'Select Folder' to browse to the folder location containing your PDF plan files.

3. Select the folder then click 'Ok' to continue. (In this example the desktop location is used.)





4. PlanSwift will bring up a list of all PDF files in the selected file location.

5. Make sure the check box is selected for all the files you want to convert.

6. Confirm the Output Folder Location. PlanSwift defaults to the same location as the PDF files, however you may select any location you want.

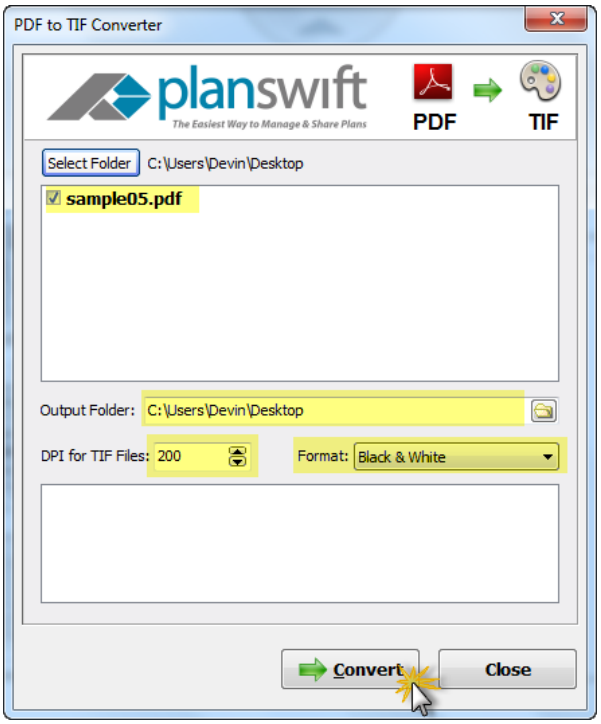
7. Select the DPI you want. The higher the number the greater the resolution will be, and the larger the file will be. Also the higher the number the longer the conversion will take.

8. Select the DPI and Format you want.

   For most plans 200 DPI and Black & White will work well, but you can change the settings when you want a different result.

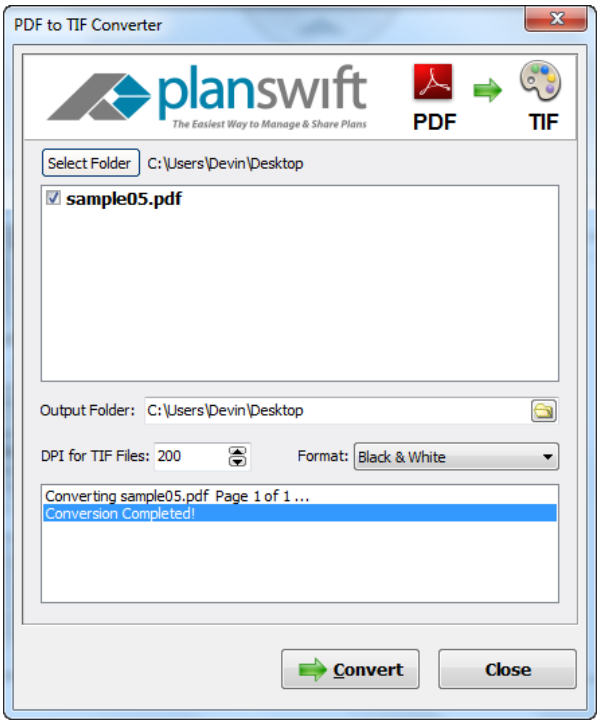
   Please keep in mind the higher the DPI or the more gray-scale/color the option you select the larger your resulting file will be.

9. Select the 'Convert' button to start the conversion process.



10. PlanSwift will convert the files and show you the status of the operation. Depending on the number of files, plan size and options this may take several minutes.

11. When complete the Conversion Completed! measure will display and the TIF files will be in the selected location. Click the 'Close' button to close this menu.



Posted Mike Ramsey - Jun 30, 2010 at 9:50 AM. This article has been viewed 1554 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=368

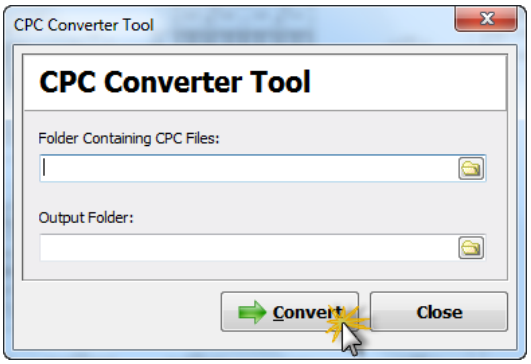
CPC to TIF Converter Tool

Article Number: 369 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:27 PM

The CPC to TIF Converter tool allows you to convert CPC files into the TIF format.

1. Select the 'CPC to TIF Converter' button.

2. Enter or browse to the location containing the CPC files.
3. Enter or browse to the output converter output location.
4. Click the 'Convert' button to start the process.



5. When PlanSwift is complete select 'Close' to close the tool.

Posted Mike Ramsey - Jun 30, 2010 at 10:20 AM. This article has been viewed 1498 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=369

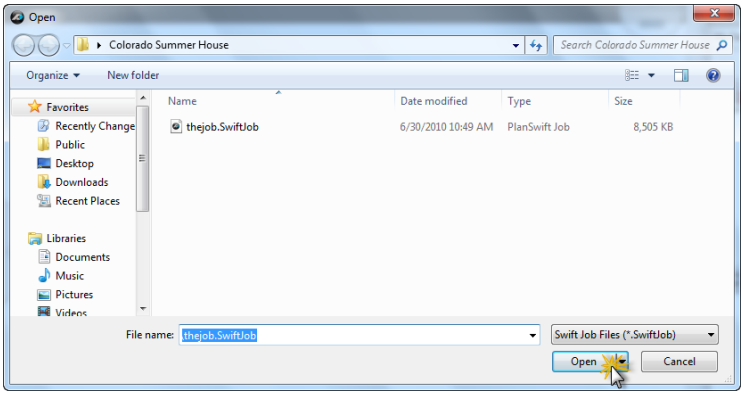
Unzip SwiftJob Tool

Article Number: 372 | Rating: Unrated | Last Updated: Jul 6, 2010 at 1:42 PM

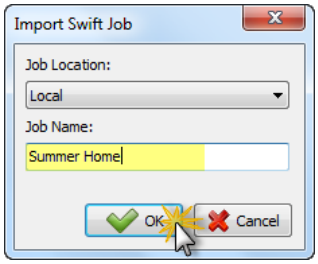
The Unzip SwiftJob Tool allows you to unzip a SwiftJob files onto your computer.

1. Select the 'Unzip SwiftJob' button.

2. Select the SwiftJob file you want to open.
3. Click the 'Open' Button to continue.



4. Select the Location to store the job and the Job Name.
5. Click 'Ok' and PlanSwift is unzip the SwiftJob file so you can open and use it.



Posted Mike Ramsey - Jun 30, 2010 at 11:07 AM. This article has been viewed 1282 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=372

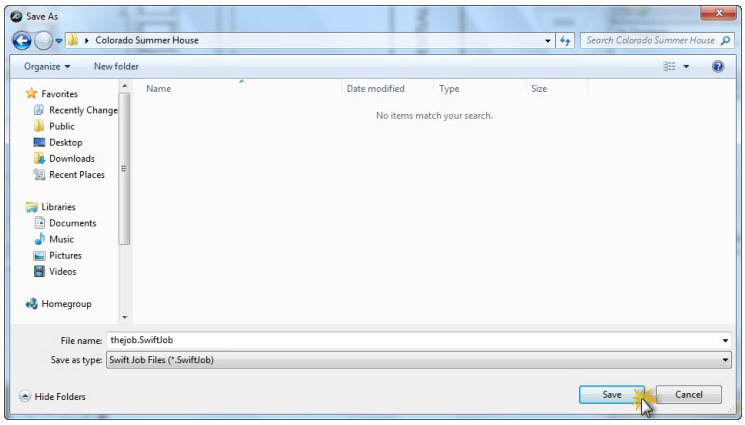
Zip SwiftJob Tool

Article Number: 371 | Rating: Unrated | Last Updated: Jul 6, 2010 at 1:38 PM

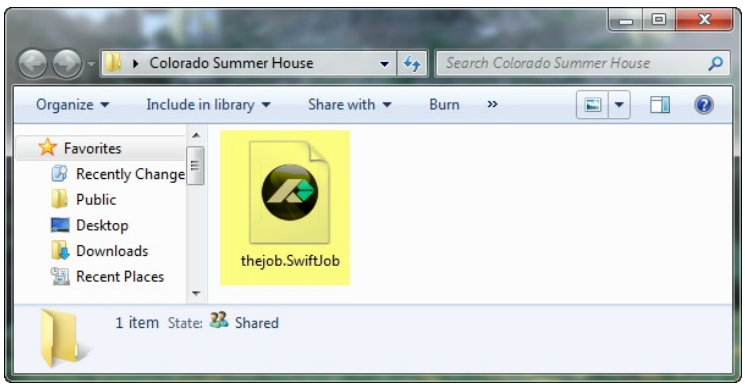
The Zip SwiftJob tool allows you to condense a job in PlanSwift for easy sending or storage.

1. Select the 'Zip SwiftJob' tool button.

2. Select the location you want to save the zipped job into.
3. Select 'Save' to start the process. The window will close automatically when the job is done.



Here is a sample of what a Zipped SwiftJob will look like.



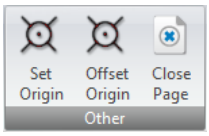
Posted Mike Ramsey - Jun 30, 2010 at 10:52 AM. This article has been viewed 1204 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=371

Page

Set Origin, Offset Origin and Close Page Tools

Article Number: 364 | Rating: Unrated | Last Updated: Jun 30, 2010 at 3:30 PM



SET ORIGIN -

OFFSET ORIGIN -

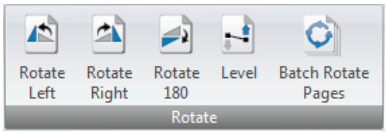
CLOSE PAGE - Closes the current page

Posted Mike Ramsey - Jun 29, 2010 at 4:27 PM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=364

Page Rotate and Level Tools

Article Number: 361 | Rating: Unrated | Last Updated: Jul 19, 2010 at 4:23 PM



Page Rotate and level tools allow you to change the orientation of pages.

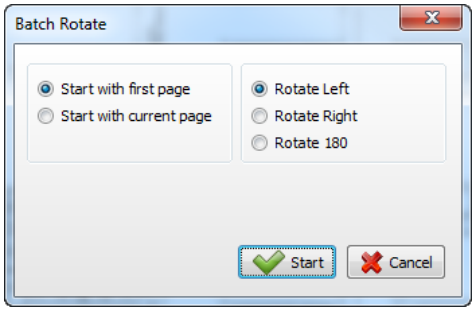
'Rotate Left' - Rotates the page counter-clockwise 90 degrees.

'Rotate Right' - Rotates the page clockwise 90 degrees.

'Rotate 180' - Rotates the page a full 180 degrees.

'Level' - Allows you to select two point that should be on a horizontal or vertical line then PlanSwift will automatically level the page.

'Batch Rotate Pages' - PlanSwift will automatically rotate all pages in a job LEFT, RIGHT, or 180.

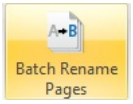


Posted Mike Ramsey - Jun 29, 2010 at 3:38 PM. This article has been viewed 1738 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=361

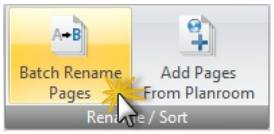
Batch Rename Pages Tool

Article Number: 359 | Rating: Unrated | Last Updated: Aug 8, 2011 at 10:49 AM



Batch Rename Pages tool makes it easy to rename multiple pages in a job.

1. Select the 'Batch Rename Pages' button.



2. Rename the first page.

3. Selecting the 'Save & Prev.' or 'Save & Next' saves the current renamed file and moves you one level up or down the list.

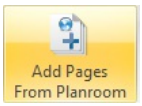
To watch the video about this topic, click here.

Posted Mike Ramsey - Jun 29, 2010 at 2:26 PM. This article has been viewed 1498 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=359

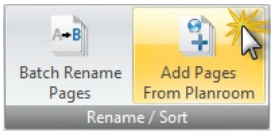
Add Pages From Planroom Tool

Article Number: 360 | Rating: Unrated | Last Updated: Aug 8, 2011 at 10:51 AM



PlanSwift allows you to add pages from Planroom quickly and easily.

1. Select the 'Add Pages From Planroom' button.



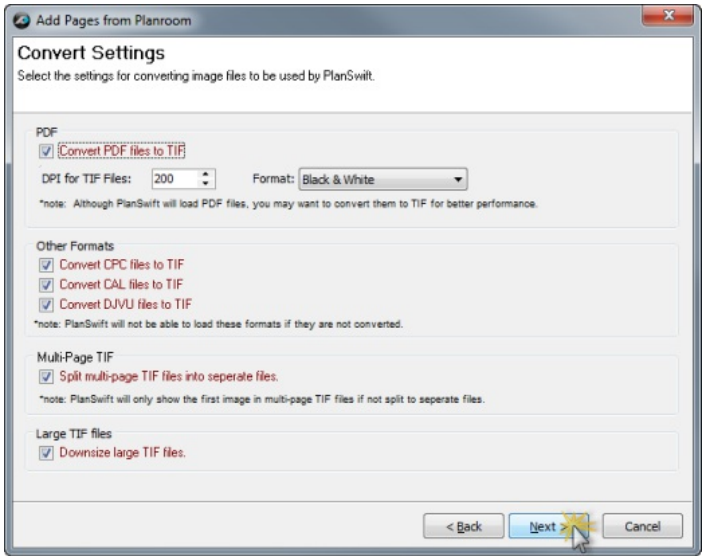
2. Select the images files you want to included in the job.

3. Click 'Next' to continue.

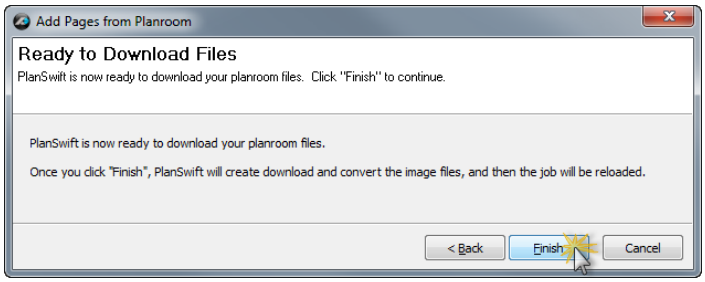
Add Pages from Planroom
Image Files
Select the image files for the digital plans that you want on this job.
Current Set
< Back
Next >
Cancel

4. Confirm the page converter settings are to your liking, if not adjust as needed.

5. Click 'Next' to continue.

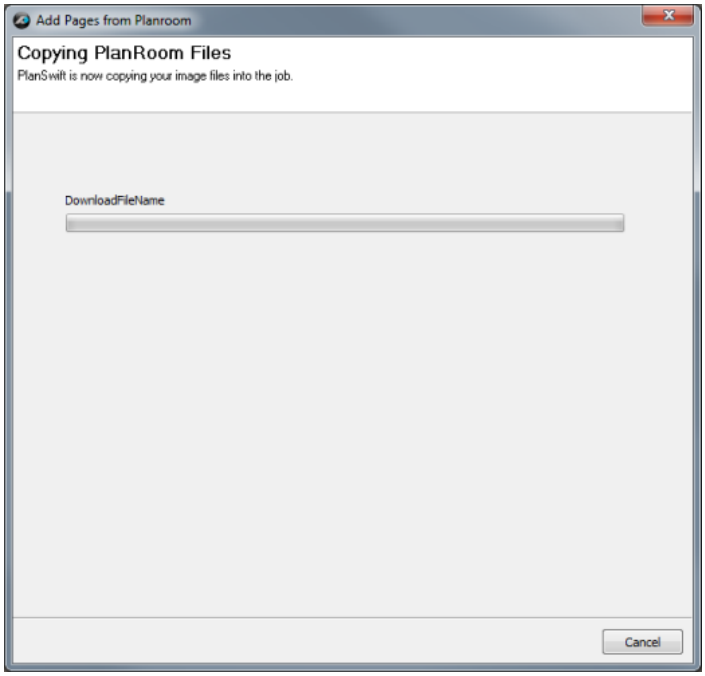

Add Pages from Planroom
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Black & White
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into seperate files.
*note: PlanSwift will only show the first image in multi-page TIF files if not split to seperate files.
Large TIF files
Downsize large TIF files.
< Back
Next >
Cancel

6. When ready click the 'Finish' button to download your planroom files.


Add Pages from Planroom
Ready to Download Files
PlanSwift is now ready to download your planroom files. Click "Finish" to continue.
PlanSwift is now ready to download your planroom files.
Once you click "Finish", PlanSwift will create download and convert the image files, and then the job will be reloaded.
< Back
Finish
Cancel

7. PlanSwift will download your files into the job. Depending on the number, size, and speed of your connection this may take some time.

8. When complete the window will close and you can start working with your new plans.



To watch the video about this topic, click here.

Posted Mike Ramsey - Jun 29, 2010 at 2:35 PM. This article has been viewed 1229 times.

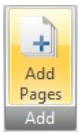
Online URL: http://www.planswift.com/phpkb/article.php?id=360

Add Pages

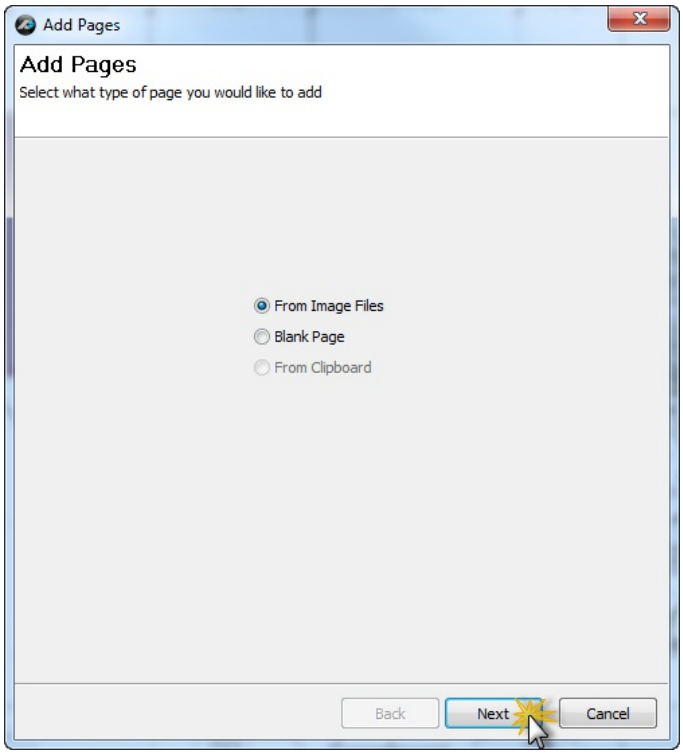
Article Number: 358 | Rating: Unrated | Last Updated: Jul 19, 2010 at 4:30 PM

Add Pages Tool allows you to simply add new pages, either from a file or blank. This tool will also convert the file format is needed.

1. Select the 'Add Pages' button from the pages tab.

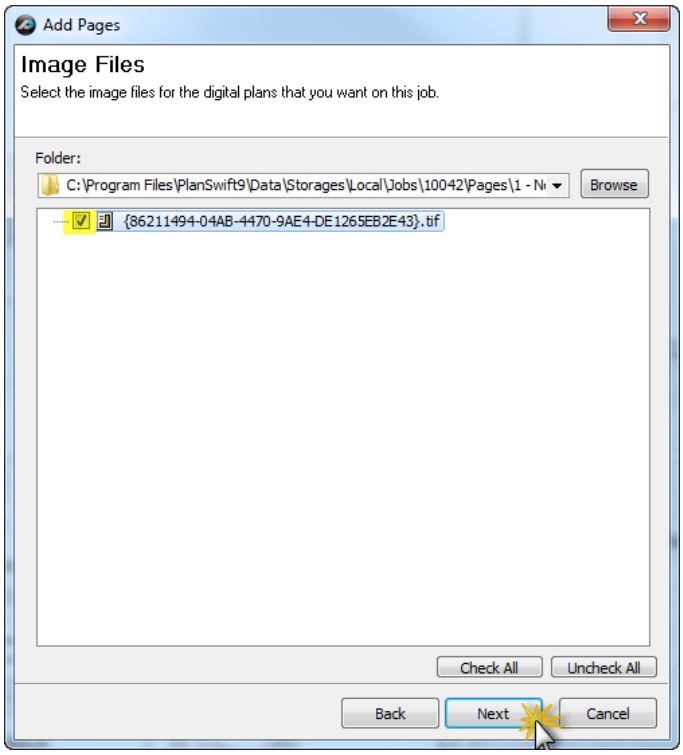


2. Select the type of page you would like to add. Then select the 'Next' button.

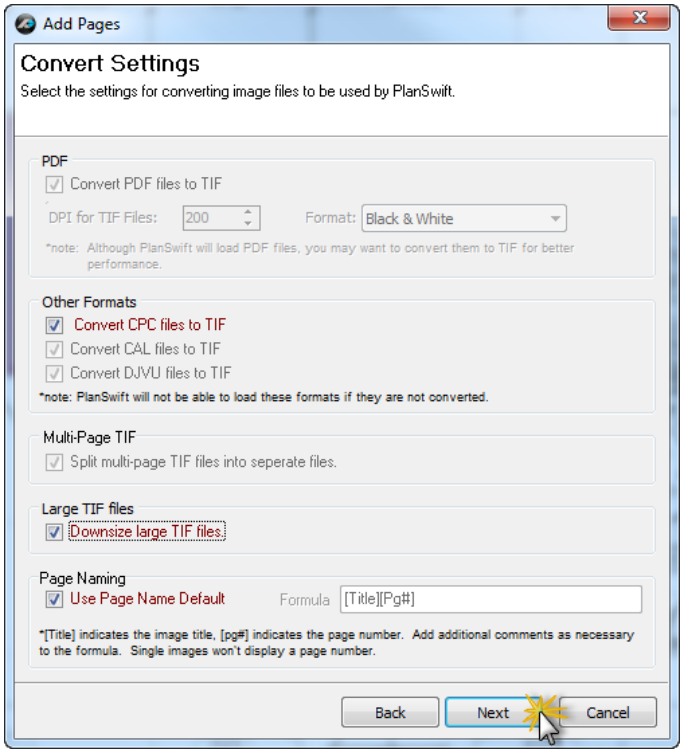


3. Select the files to be added. Make sure the check box is selected for the files you want to add.

4. Click the 'Next' button to continue.

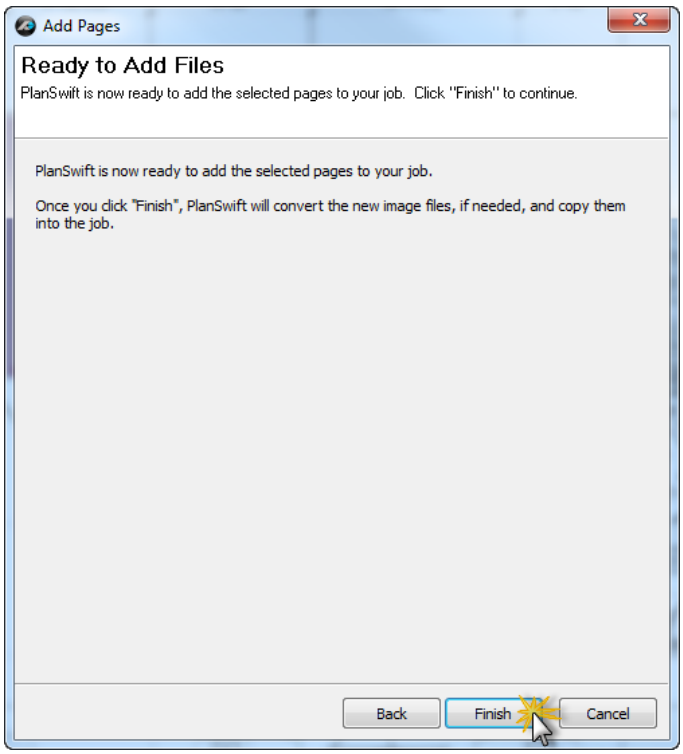


5. Set the converter functions as needed. Then click the 'Next' button.


Add Pages
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Black & White
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into seperate files.
Large TIF files
Downsize large TIF files.
Page Naming
Use Page Name Default
Formula
[Title][Pg#]
*[Title] indicates the image title, [pg#] indicates the page number. Add additional comments as necessary to the formula. Single images won't display a page number.
Back
Next
Cancel

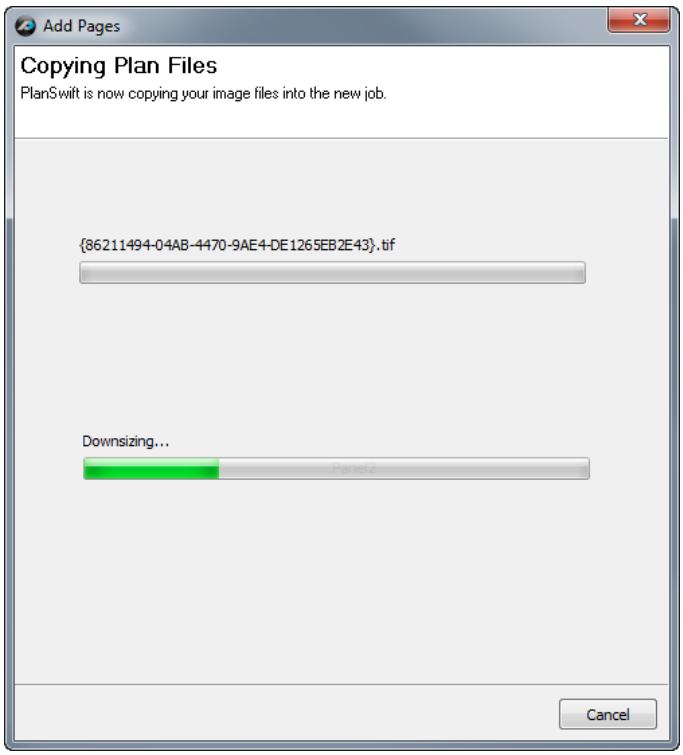
6. PlanSwift confirms you are ready to add the files. If you need to make changes you can select the 'Back' button.

7. Click 'Finish' to add the files.


Add Pages
Ready to Add Files
PlanSwift is now ready to add the selected pages to your job. Click "Finish" to continue.
PlanSwift is now ready to add the selected pages to your job.
Once you click "Finish", PlanSwift will convert the new image files, if needed, and copy them into the job.
Back
Finish
Cancel

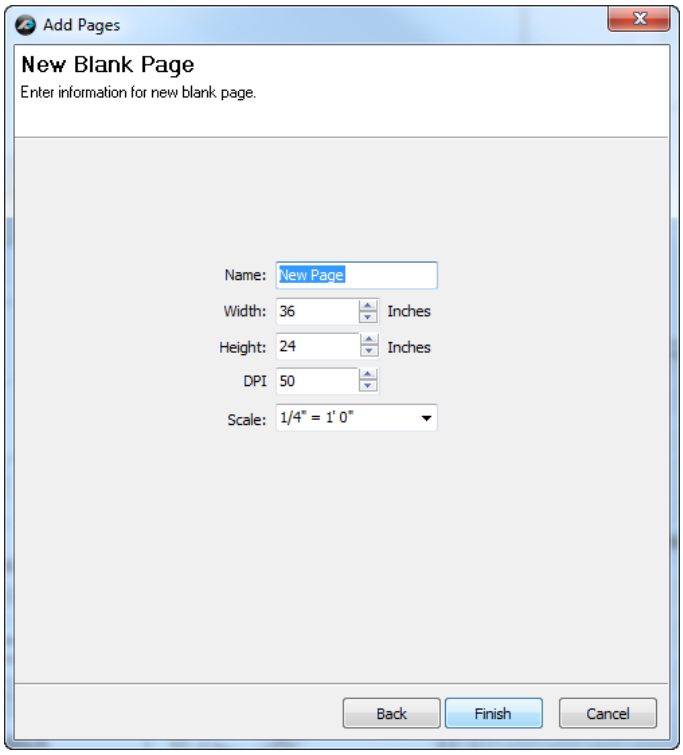
PlanSwift shows you the progress. Depending on the size and number of files this process may take several minutes.

When the process is complete this box will close and you will see the new pages.



If you would rather add a blank page you will be taken to this page allowing you to select options.

Click 'Finish' and this page will be added to your job.

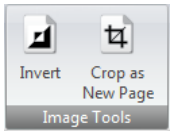


Posted Mike Ramsey - Jun 29, 2010 at 1:57 PM. This article has been viewed 1222 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=358

Page Invert and Crop as New Page Tools

Article Number: 363 | Rating: Unrated | Last Updated: Jul 6, 2010 at 11:55 AM



The Page Invert and Crop as New Page Image Tools allow you to easily update your job pages.

'Invert' - Inverts the black and white colors on a page so the areas that were black now will appear white.

'Crop as New Page' - Allows you to crop a page down in size and save it as a new page in the project all in one step.

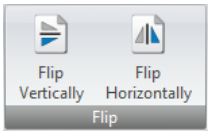
Both of these tools are automatic when you select the button.

Posted Mike Ramsey - Jun 29, 2010 at 4:08 PM. This article has been viewed 1144 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=363

Page Flip Tool

Article Number: 362 | Rating: Unrated | Last Updated: Jul 6, 2010 at 11:53 AM



The page flip tool allows you to flip the page you are working on.

'Flip Vertically' - Flips the page so the bottom is now at the top.

'Flip Horizontally' - Flips the page so the left side in now on the right.

Posted Mike Ramsey - Jun 29, 2010 at 3:57 PM. This article has been viewed 934 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=362

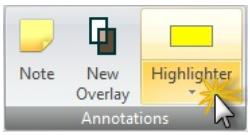
Home

Highlighter Tool

Article Number: 353 | Rating: Unrated | Last Updated: Aug 8, 2011 at 2:52 PM

The Highlighter tool allows you to mark areas of your plans in color freehand.

1. Select the 'Highlighter' button. If you select the lower part of the button the color drop down menu will open to allow you to select the color you would like.

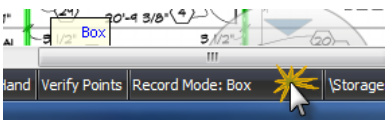


2. To draw straight lines pick the starting point left click your mouse then move to the end point or corner.

3. Right click again. You can make as many connecting lines as you want or can have multiple unconnected lines.

4. To draw freehand or curved paths simply hold the lift mouse button down as you move the cross hairs.

5. To draw boxes simply set the 'Record Mode' from 'Point to Point' to 'Box' at the bottom of the screen.



6. When you are done click the 'Digitizer Record' button or ESC to stop.

To watch the video about this topic, click here.

Posted Mike Ramsey - Jun 29, 2010 at 12:31 PM. This article has been viewed 3757 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=353

Scaling a Plan Image

Article Number: 349 | Rating: Unrated | Last Updated: May 29, 2012 at 9:10 PM

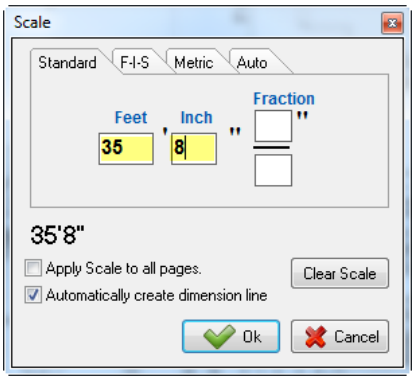
A plan image must be scaled before any digitizing can be done. If a plan image needs rotating or leveling, this needs to be done before the image is scaled. To scale a plan image:

1. Click on the plan image to scale.

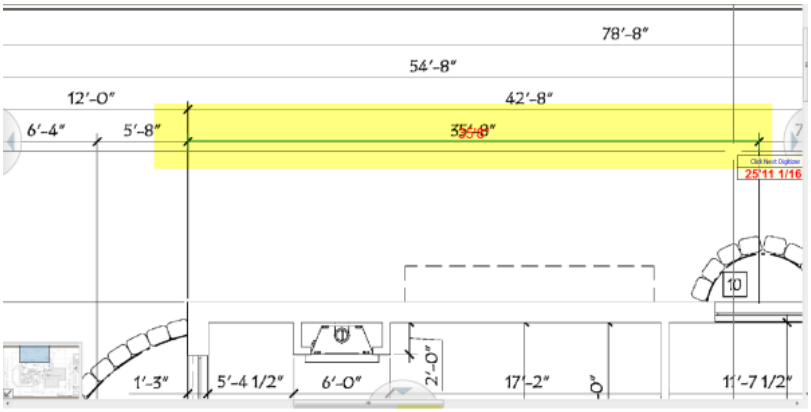
2. Select a dimension on the plan image to scale, preferably one over 20 ft long for best accuracy. It does not matter whether the dimension is horizontal or vertical but for best results doing both will help.

3. Select the 'Scale' button from the toolbar.

4. Enter the dimension into the Scale Dimension dialog and click the 'Ok" button.



5. Now click two points on the plan image that correspond to the dimension entered. You will want to carefully zoom and select the center of the dimension lines for best accuracy.



6. Once the image has been scaled, an arrow icon will appear next to the plan name in the pages window. The arrow will also show the direction that page has been scaled.

Alternately you can select from standard scaling options by selecting the lower portion of the button. However automatic setting of scale is only as accurate as the scanned in drawings. Make sure you double check several dimensions on each page to make sure the scale was set accurately.

Note: To re-scale a page simply repeat the above steps.
Note: A page can be scaled both horizontally and vertically for greatest accuracy. Just do the scale process once for a vertical measurement and once for a horizontal measurement.

Posted Mike Ramsey - Jun 29, 2010 at 10:28 AM. This article has been viewed 3744 times.

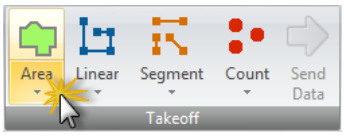
Online URL: http://www.planswift.com/phpkb/article.php?id=349

Area Tool

Article Number: 354 | Rating: Unrated | Last Updated: May 29, 2012 at 8:09 PM

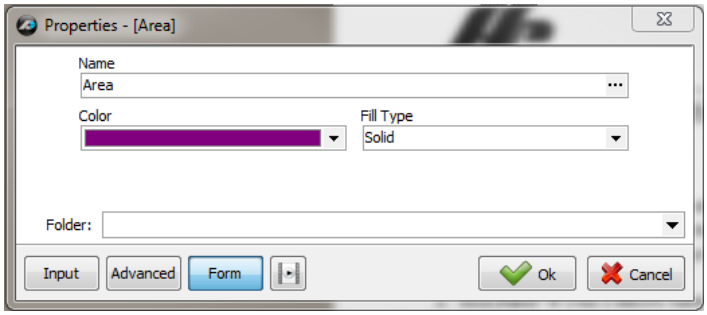
Calculating square foot areas in PlanSwift is simple:

1. Open a plan image in the PlanSwift software, and press the Upper half of the New 'Area' button from the Toolbar. This will create a basic area. Selecting the lower half opens a drop down menu of tools based on the basic area object such as the Joist Tool.

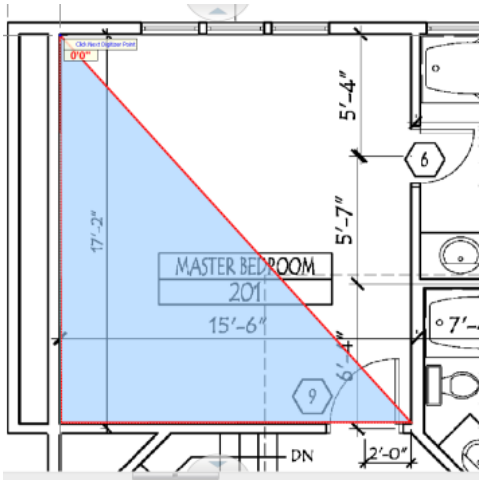


2. Enter a name for the area, and choose a color.

3. Click the 'Ok' button.



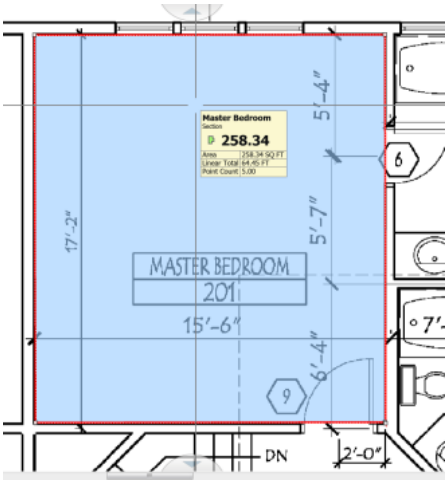
4. Set points on the outside of the area you wish to use.



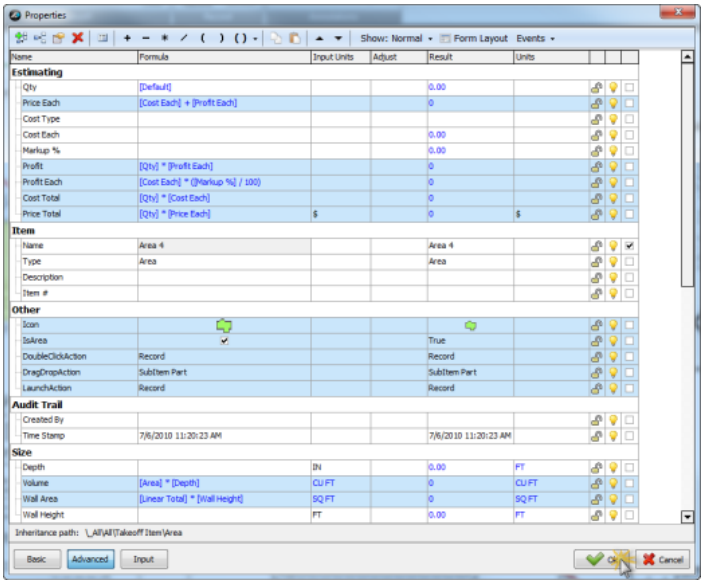
5. After the area is completed, right mouse click and choose Stop. Notice the square footage is reported next to the area's name underneath the plan image that contains the area. To continue digitizing a different section with the same area press the green button next to the item in the pages list or you can right click on the area and select 'New Section'.

In PlanSwift 9.3 and later you can double-click to complete an area, this will also leave "Digitizer

Record" on so you can continue digitizing area's. An example of this would be if you are digitizing a square area; double-click while picking third point, the area will close an you may continue with a new Area. The new area(s) will be grouped with the previously closed area, similar to selecting an area and clicking the "New Section" button.



The 'Advanced' option button will provide you will more options if you wish to use them.



To watch a video about how to takeoff a new area, click here.

Posted Mike Ramsey - Jun 29, 2010 at 12:51 PM. This article has been viewed 3638 times.

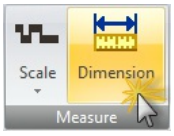
Online URL: http://www.planswift.com/phpkb/article.php?id=354

Dimensions

Article Number: 350 | Rating: Unrated | Last Updated: May 30, 2012 at 6:13 PM

Finding the dimension of any length in PlanSwift is easy.

1. Select the 'Dimension' button.



2. You can customize the line color and text color of your dimensions.

   Name - Allow you to name the dimension to something more fitting.

   Color - Select the color of the dimension line. By click on the colored area will bring up a color

palate option box.

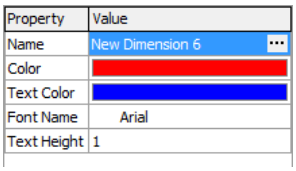
Text Color - Select the color of the dimension text.

Font Name - Allows you to change the font style for the text.

Text Height - Allows you to change the size of font used on the dimension line. In 9.3 and above this also controls the size of the Dimensions ticks (arrows).

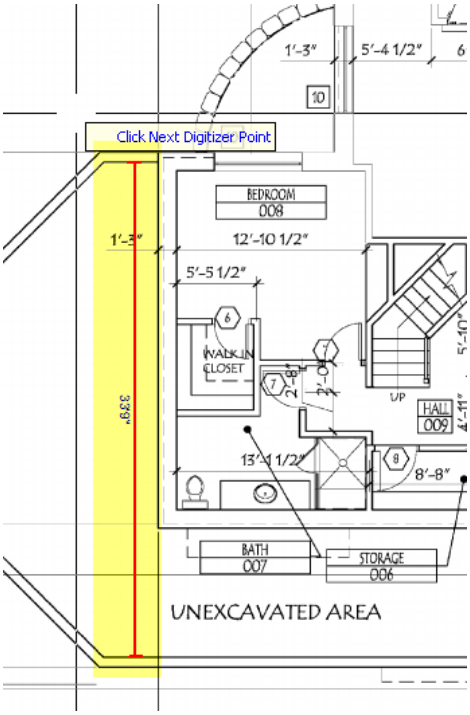
Arrowheads - In 9.3 and above you can select this option to add ticks (arrow heads) to the end of your dimension lines.

Precision - In 9.3 and above you can set your dimensions precision to the nearest 1" (1), 1/2" (2), 1/4" (4), 1/8" (8) or 1/16" (16). ****Applies to imperial (standard) measurements only.***



In 9.3 and above the Properties section looks like this:

3. Select the stating point by left clicking your mouse, then move to the end point and left click again. This will give you the dimension. You can continue select dimensions with the same colors.



4. When you are done, press the 'Digitizer Record' button or Ctrl-C to stop the dimension system.

TIP: If you have have Ortho enabled and need to place a dimension on an angle off of one of the cardinal coordinates you can either turn off Ortho or hold the SHIFT key while placing the dimension line.

To remove a dimension, simply select the desired dimension by clicking with the cursor, and press delete on your keyboard.

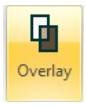
To watch a video about how to add dimensions, click here.

Posted Mike Ramsey - Jun 29, 2010 at 11:08 AM. This article has been viewed 3417 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=350

Overlay Plans

Article Number: 352 | Rating: Unrated | Last Updated: Aug 5, 2011 at 2:18 PM



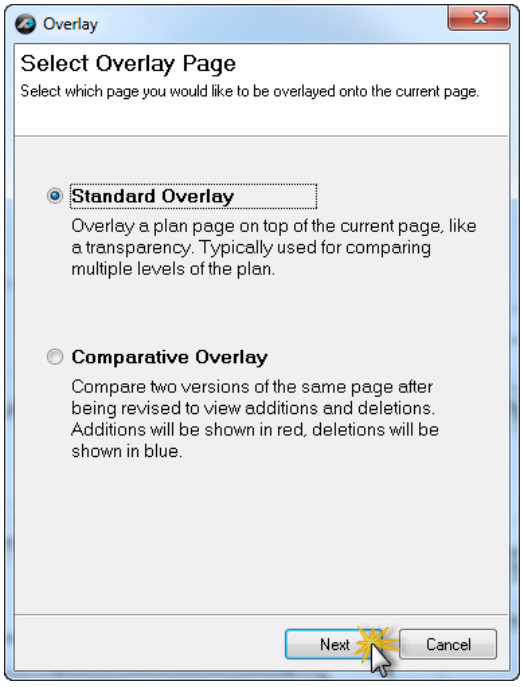
The New Overlay tool allows you to place a separate page from your plans onto the page that you are currently viewing.

1. Select the 'New Overlay' button.

2. Select the type of overlay you want.

> Standard Overlay - Places a second page on the current page you are viewing, usually for comparing the two images.
>
> Comparative Overlay - Places a revised plan over the original plan. This will let you view revisions made in the plan. Additions are shown in red, and deletions are shown in blue.

3. Once you have made your selection, click the 'Next' button to continue.


Overlay
Select Overlay Page
Select which page you would like to be overlayed onto the current page.
Standard Overlay
Overlay a plan page on top of the current page, like a transparency. Typically used for comparing multiple levels of the plan.
Comparative Overlay
Compare two versions of the same page after being revised to view additions and deletions. Additions will be shown in red, deletions will be shown in blue.
Next
Cancel

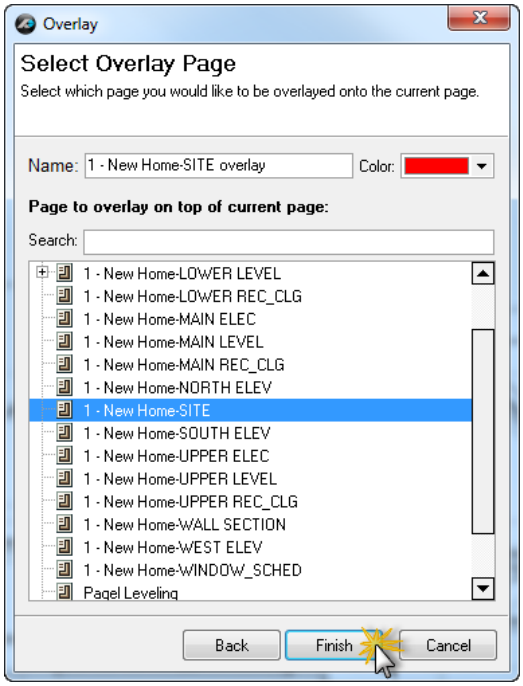
4. Select the page you want to overlay from the menu. You can select the page by clicking on it. Or you can search your job to help find the page.

> You can also select what color you would like the overlay to be. PlanSwift automatically chooses a color for you, if you would like a different color, click on the box next to "Color".

5. Click 'Finish' to Continue.

This will place the overlay on top of your current page. A small window will open asking if you would like to align the overlay, if so, click "Yes". This lets you move the overlay to match your current image.

To turn the overlay on or off, simply click the light bulb icon next to its name.


Overlay
Select Overlay Page
Select which page you would like to be overlayed onto the current page.
Name: 1 - New Home-SITE overlay
Color:
Page to overlay on top of current page:
Search:
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Back
Finish
Cancel

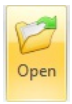
To watch a video about adding overlays, click here.

Posted Mike Ramsey - Jun 29, 2010 at 11:50 AM. This article has been viewed 2919 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=352

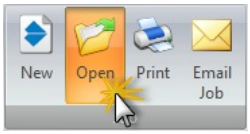
Open Existing Job

Article Number: 341 | Rating: 4/5 from 1 votes | Last Updated: Aug 5, 2011 at 2:49 PM

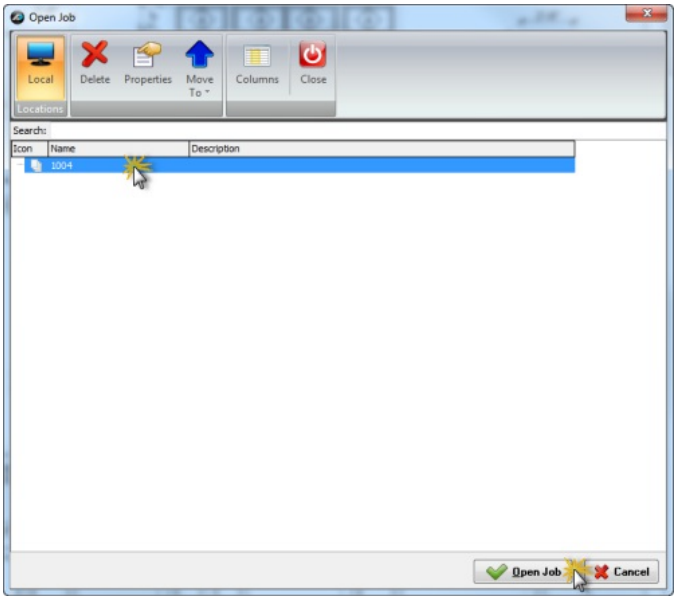


OPEN button allows you to open existing jobs.

1. To open an existing job select the 'Open' button.



2. Select the location of the stored job.
3. Select the Job.
4. Click 'Open Job' to finish and open the job.



Please note: If you have upgraded from version 8 to version 9 your previous jobs will not be displayed. Please see this article for assistance on upgrading from 8 to 9

To watch a video about how to open an existing project, click here.

Posted Mike Ramsey - Jun 29, 2010 at 7:12 AM. This article has been viewed 2620 times.

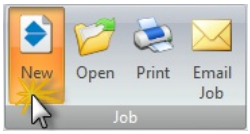
Online URL: http://www.planswift.com/phpkb/article.php?id=341

New Set of Plans or New Job

Article Number: 340 | Rating: 5/5 from 1 votes | Last Updated: Jul 6, 2010 at 10:51 AM

The "New set of Plans" button is the starting point for creating a new job in PlanSwift. When you click this button the "New Job" window will open.

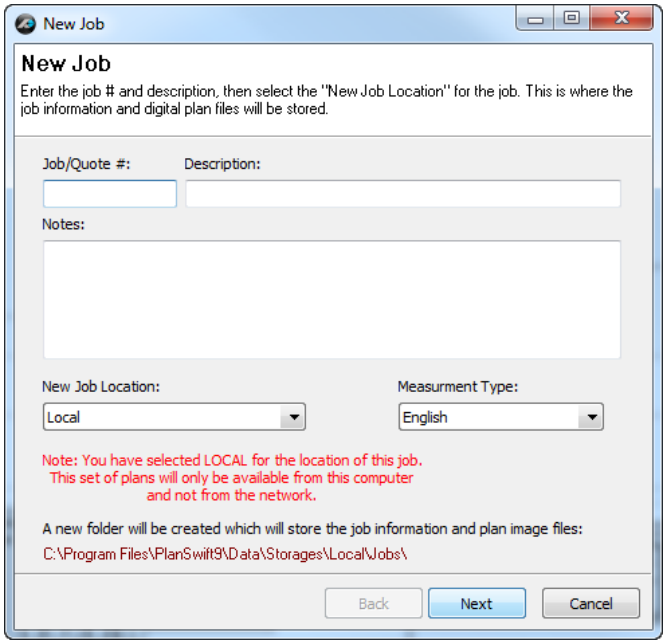
1. Select the 'New' button to begin.



2. You may enter a Job or Quote number, Description, and Job Notes.

3. Select the storage location for the job data. The drop down list will show you all of your available locations. To create a new location see New Data Storage.

4. Click 'Next' to finish.


New Job
New Job
Enter the job # and description, then select the "New Job Location" for the job. This is where the job information and digital plan files will be stored.
Job/Quote #:
Description:
Notes:
New Job Location:
Local
Measurment Type:
English
Note: You have selected LOCAL for the location of this job.
This set of plans will only be available from this computer
and not from the network.
A new folder will be created which will store the job information and plan image files:
C:\Program Files\PlanSwift9\Data\Storages\Local\Jobs\
Back
Next
Cancel

Posted Mike Ramsey - Jun 29, 2010 at 6:56 AM. This article has been viewed 2567 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=340

Zoom and Pan

Article Number: 348 | Rating: Unrated | Last Updated: May 29, 2012 at 8:55 PM

Zoom - Allows you to select an area on your plans which will be zoom to fill your screen area.

Fit to Page (Zoom to Fit in 9.2 and earlier) - Re-sizes the current plan to fit in the edit window (you will also see Sheet Size information above the plan, Measurement Type below it and the current scale in the upper left).

Zoom to Max (9.3+) - Re-sizes the editing screen to show then entire editing space boundaries, even the space outside of the current plan. Including the page information.

Zoom In - Zooms into the plan centering on the center of your desktop. You can also Zoom in my rolling the wheel on a wheel mouse up.

Zoom Out - Zooms out of the plan centering on the center of your desktop. You can also Zoom in my rolling the wheel on a wheel mouse up.

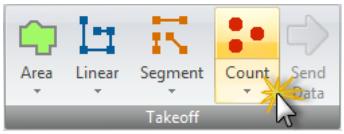
Pan - When selected you can left click on the plan and drag a different part of it into the current view. You can also Pan by clicking and holding down the wheel on a wheel mouse.

Posted Mike Ramsey - Jun 29, 2010 at 10:09 AM. This article has been viewed 2513 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=348

New Count Tool

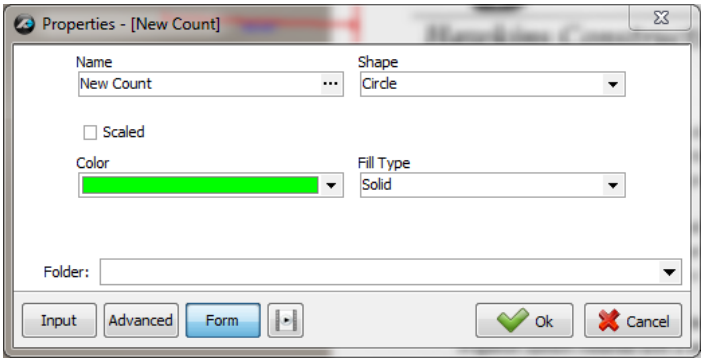
Article Number: 357 | Rating: Unrated | Last Updated: Aug 15, 2011 at 10:25 AM



The "New Count" tool allows you to create a digitizer Count to mark and count items on the plan, allowing you to quickly total up items on the plan.

1. Begin by selecting the COUNT button.

2. This window allows you to name your Count and choose a color for it. PlanSwift will automatically pick a random color. If you would like to use a different color, click on the drop down menu under "Color". If you select the 'Scaled' option, you will be allowed to edit the size of the points.



3. Once you have filled out your information in the provided areas click OK to continue.

    Make sure your page is scaled, if not , PlanSwift will automatically open the "Scale" window.

    Notice that the "Digitizer Record" button is now red, this indicates that the on-screen digitizer in now working. Now, simply click and mark your items that you want to be counted. If you accidentally click in the wrong spot, you can undo it by pressing "Backspace" or "Ctrl-z" on your keyboard.

4. End the on-screen digitizer by pressing "Esc" or by clicking the "Digitizer Record" button.

To watch a video about how to takeoff a new count, click here.

Posted Mike Ramsey - Jun 29, 2010 at 1:23 PM. This article has been viewed 2298 times.

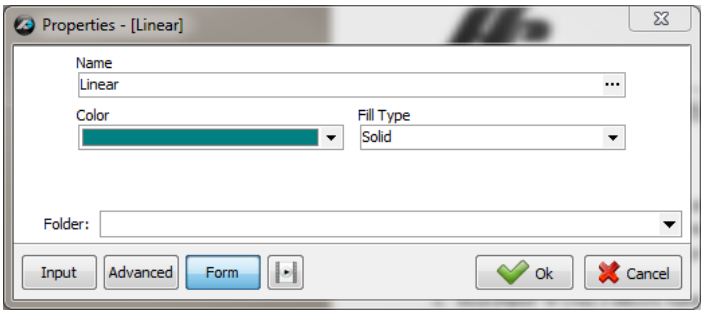
Online URL: http://www.planswift.com/phpkb/article.php?id=357

Linear Tool

Article Number: 355 | Rating: Unrated | Last Updated: May 29, 2012 at 8:09 PM

The "New Linear" tool allows you to create a Linear digitized item on your plan.

1. Select LINEAR to open the linear tool box.



2. On this window, you can name your Linear item and choose a color for it.

    PlanSwift automatically picks a random color, if you would like a different color, simply click the drop down menu under "Color".

    The "New Linear" tool is very easy to use, just click two or more points.

3. When you are finish setting the properties select the OK button to continue.

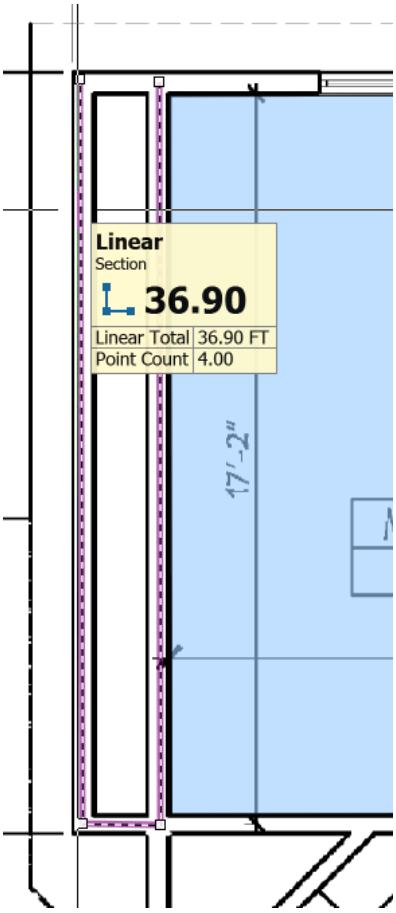
Make sure your page is scaled, if not , PlanSwift will automatically open the "Scale" window.

Notice that the "Digitizer Record" button red, this indicates that the on-screen digitizer in now working.

4. Simply click on the endpoints of your Linear item. If you accidentally click in the wrong spot, you can undo it by pressing "Backspace" or "Ctrl-z" on your keyboard.

In PlanSwift 9.3 and later you can end a Linear and remain in the "Digitizer Record" mode by double-clicking the final point of a Linear. After the double-click you can quickly enter a new Linear without clicking the Linear button.

5. End the on-screen digitizer by pressing "Esc" or by clicking the "Digitizer Record" button.



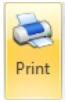
To watch a video about how to takeoff a new linear, click here.

Posted Mike Ramsey - Jun 29, 2010 at 1:02 PM. This article has been viewed 2258 times.

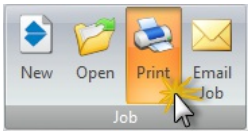
Online URL: http://www.planswift.com/phpkb/article.php?id=355

Print Plans and Images

Article Number: 342 | Rating: Unrated | Last Updated: Aug 3, 2011 at 10:47 AM



1. Select the 'Print' button.



2. Select what information you want to print.

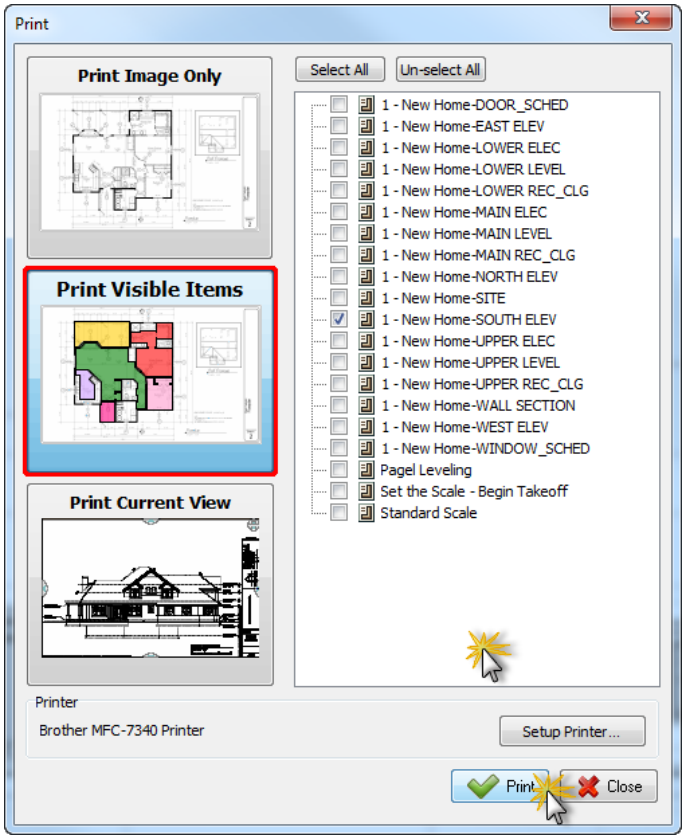
'Print Images Only'-Prints only the plan images **without** any color coding or other PlanSwift material.

'Print Visible Items'-Prints the plan images along **with** PlanSwift markups (This would include the Legend if the Legend is visible on the image for more info on legends click here).

'Print Current View'-Prints only the current page you are on as it appears on your screen.

3. With 'Print Image Only' and 'Print Visible Items' you can select any page image you want to print. Select the check box for each page you want to print, or 'Select All' for all the pages in the job.

4. Click 'Print' to start the printing process.



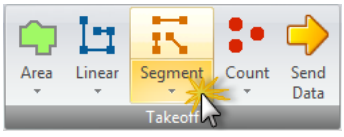
Note: Printing to scale is not possible unless the original electronic file is to scale and the selected print size corresponds to the original file.

Posted Mike Ramsey - Jun 29, 2010 at 7:30 AM. This article has been viewed 2131 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=342

New Segment Tool

Article Number: 356 | Rating: 1/5 from 1 votes | Last Updated: Aug 5, 2011 at 11:14 AM



The "New Segment" tool allows you to create a â€

Posted Mike Ramsey - Jun 29, 2010 at 1:14 PM. This article has been viewed 1923 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=356

Navigation Buttons

Article Number: 347 | Rating: Unrated | Last Updated: Aug 2, 2010 at 4:11 PM

The navigation buttons allow you to move backwards and forward in the Pages you are working on.

'Back'-will move you to the page previous to the current page.

"Forward'-will move you to the next page.

The previous and next pages are not always the next in the list. PlanSwift goes by the pages you are viewing. This way you do not need to skip pages you are not using.

Posted Mike Ramsey - Jun 29, 2010 at 9:55 AM. This article has been viewed 1817 times.

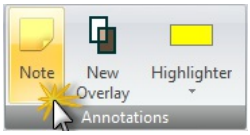
Online URL: http://www.planswift.com/phpkb/article.php?id=347

Notes

Article Number: 351 | Rating: Unrated | Last Updated: Aug 5, 2011 at 2:18 PM

Making notes on a plan is simple.

1. Select the 'Note' button from the annotations menu.



2. Select where on the page you want to place the note and the size by dragging the square to the size you want.

3. When you release the square the notes properties button will open. Here you can type the note you want along with selecting color and size options.

Name - Allows you to give the note a useful name.

Text - Enter what you want the note to read.

Font Name - Allows you to change the font used in the note.

Text Height - Allows you to change the size of the text by entering an new number in the field.

Color - Allow you to select the color of the note. To change colors click the drop down menu and a full color option menu will be available.

Transparency - Allows you to set how much of the page behind the not is visible.

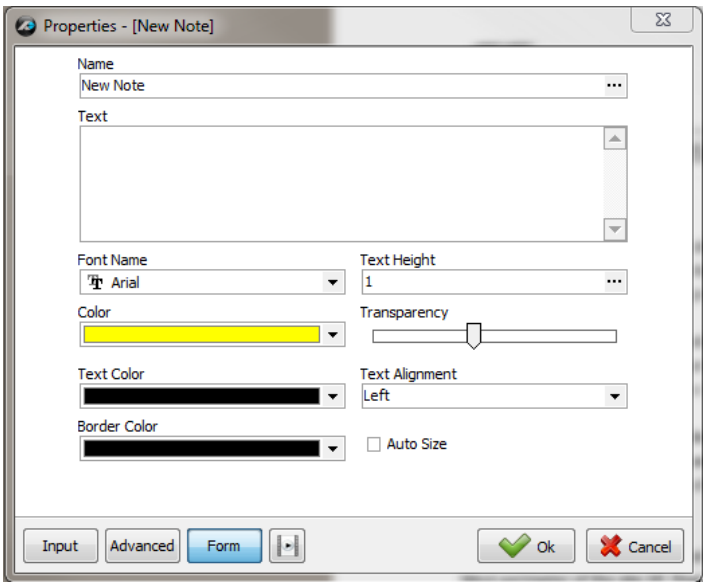
Text Color - Allows you to set the color of the text used in the note.

Text Alignment - Select the alignment of the text: left, center, or right.

Border Color - Allows you to select the color of the note border, or no color at all.

Auto Size - When selected will automatically change the size of the note to fit your text.

4. When done click the 'Ok' button to close the box. Your note is now finished.



To watch a video about creating page notes, click here.

Posted Mike Ramsey - Jun 29, 2010 at 11:32 AM. This article has been viewed 1747 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=351

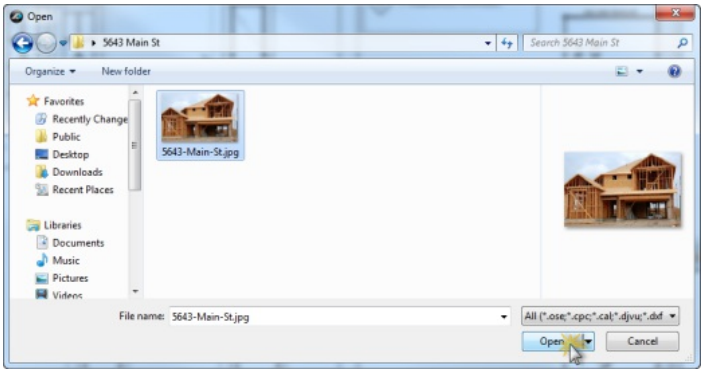
Image

Article Number: 1656 | Rating: Unrated | Last Updated: Aug 5, 2011 at 11:18 AM

You can add an image to any page in PlanSwift simply and quickly.

1. Select the page you want to add an image to.
2. Select the 'Image' button to start.

3. Select the image you want to add. You can browse to the image or enter the location.
4. Click 'Open' to continue.



5. Select the first point for the image, then holding the left mouse button you can size the image as you like.
6. Release the mouse button to finish.

To watch a video about adding an image to a page, click here.

Posted Mike Ramsey - Jul 20, 2010 at 9:57 AM. This article has been viewed 1616 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1656

Email Jobs

Retrieving and Download Plans, Files and Screenshots

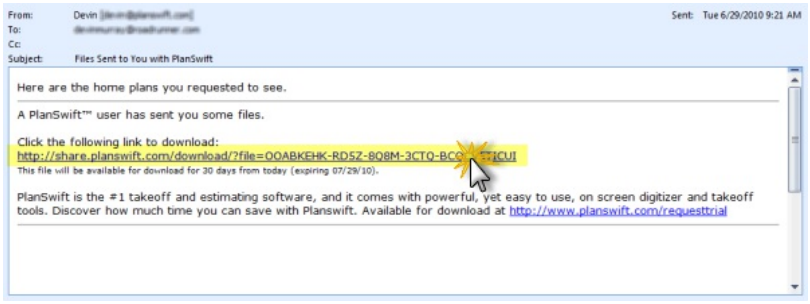
Article Number: 346 | Rating: Unrated | Last Updated: Jul 6, 2010 at 9:45 AM

Retrieving and downloading plans sent to you by a PlanSwift user is simple, easy, and best of all can be done when you are ready.

The plans are stored on PlanSwift's servers until you request them. This keeps your computer or smart phone from slowing down with a download at a bad time.

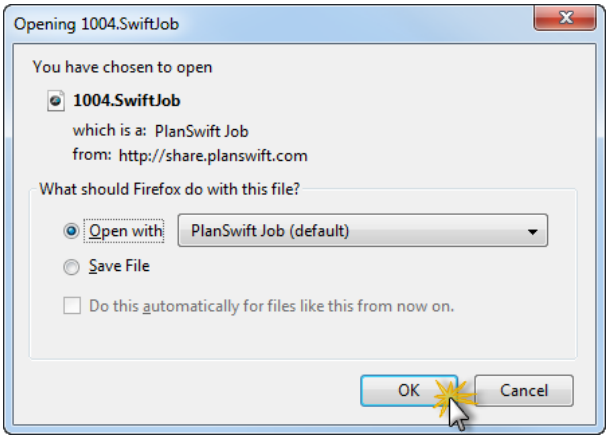
1. You should receive an email from the sender as soon as the plans, files or screenshot have completely uploaded.

2. Click on the blue link (highlighted here) or cut and paste this link into your browser to start the download.

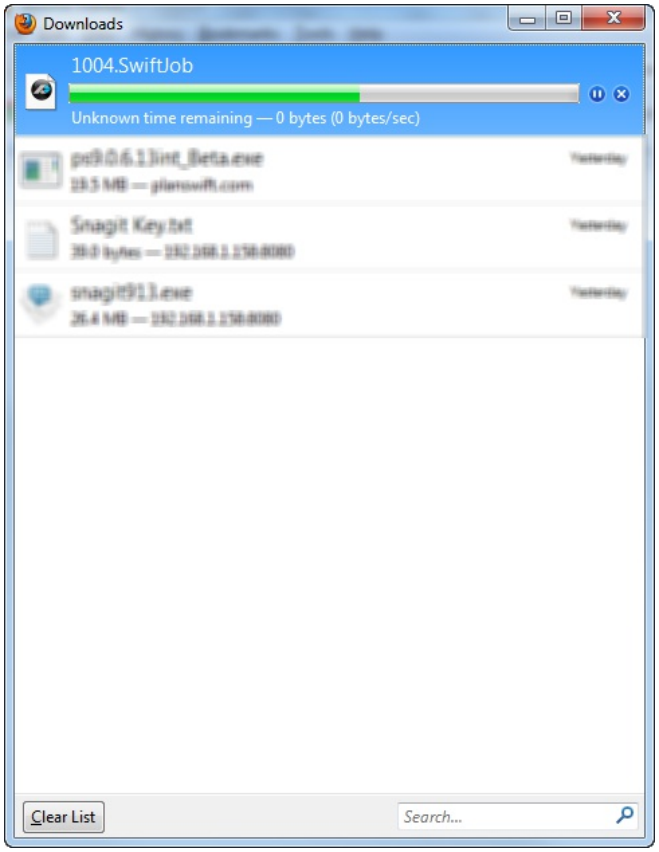

From:
To:
Cc:
Subject: Files Sent to You with PlanSwift
Sent: Tue 6/29/2010 9:21 AM
Here are the home plans you requested to see.
A PlanSwift™ user has sent you some files.
Click the following link to download:
http://share.planswift.com/download/?file=OOABKEHK-RD5Z-8Q8M-3CTQ-BC
This file will be available for download for 30 days from today (expiring 07/29/10).
PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift. Available for download at http://www.planswift.com/requesttrial

3. Select if you want to open the file in PlanSwift or save the file on your computer.

4. Click the "Ok' button to continue.

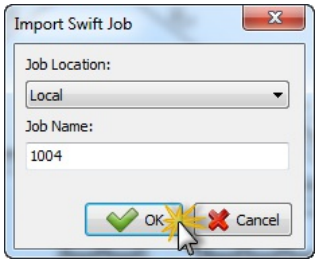


Depending on the size of the files and the speed of your connection the download may take several minutes.



5. When importing the files into PlanSwift you can select the location the files will be stored and the Job name associated with the files.

6. Click the "Ok' button and you are done. The plans, screenshot or files are ready to use.



Posted Mike Ramsey - Jun 29, 2010 at 9:17 AM. This article has been viewed 1329 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=346

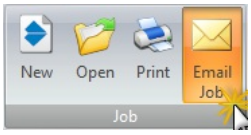
Email Plans

Article Number: 343 | Rating: Unrated | Last Updated: Aug 5, 2011 at 11:02 AM

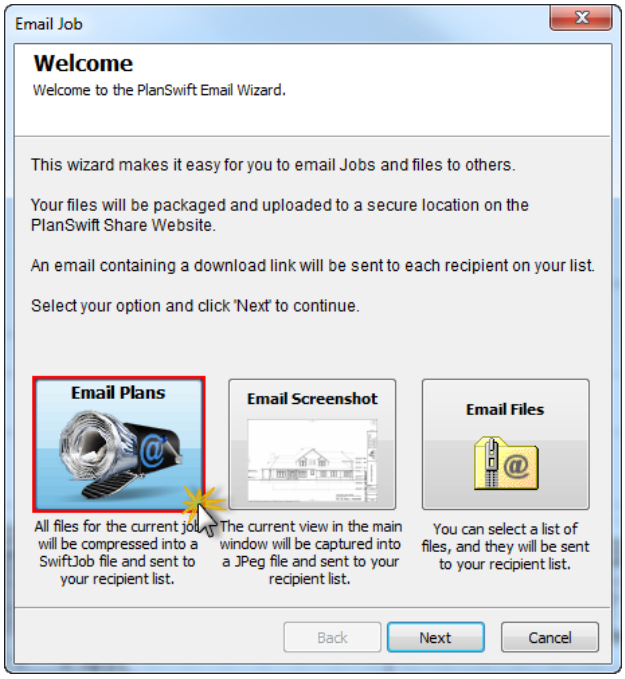
Emailing job plans to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email plans select the 'Email Job' button.

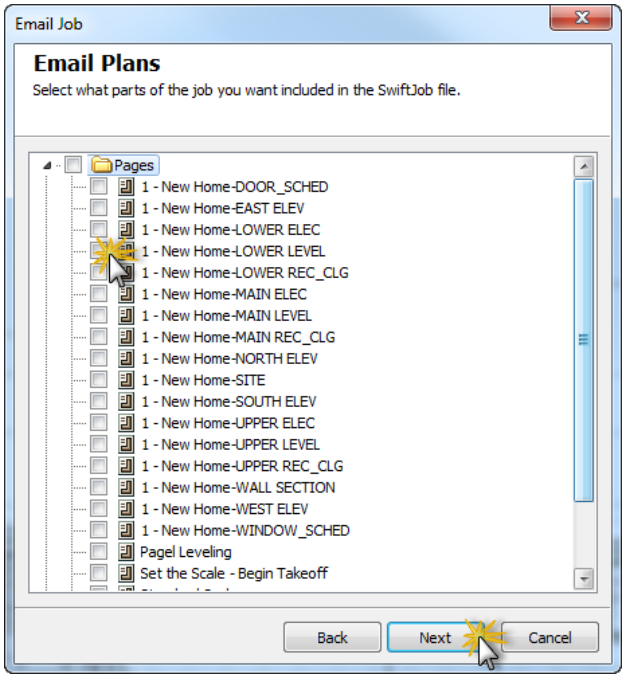


2. Select 'Email Plans' and the 'Next' button.


Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
Email Screenshot
Email Files
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

3. Select the plans you want to email be checking the box in front of the plan. To select all pages in a plan folder mark the check box for the folder.

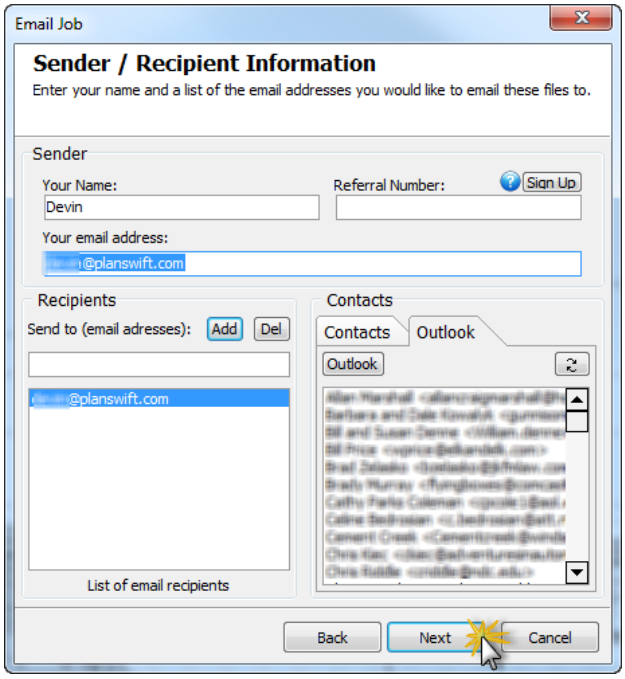
4. After selecting all the plans you want to email click the 'Next' button to continue.


Email Job
Email Plans
Select what parts of the job you want included in the SwiftJob file.
Pages
1 - New Home-DOOR_SCHED
1 - New Home-EAST ELEV
1 - New Home-LOWER ELEC
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Set the Scale - Begin Takeoff
Back
Next
Cancel

5. Complete the Sender / Recipient Information including your name and email address.

   To add recipients you can type their email address in the box and select 'Add or choose the name from your contacts or outlook list.

6. Select 'Next' to continue.



To watch a video about Emailing Plans, click here.

Posted Mike Ramsey - Jun 29, 2010 at 8:10 AM. This article has been viewed 1134 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=343

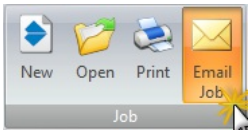
Email Files

Article Number: 345 | Rating: Unrated | Last Updated: Aug 5, 2011 at 10:58 AM

Emailing job plans to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email files select the 'Email Job' button.



2. Select the 'Email Files' button and then click the "Next" button.

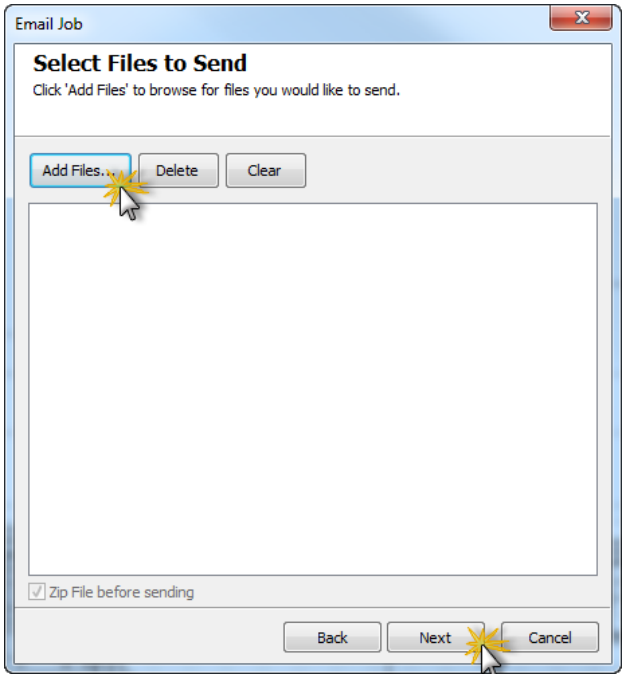
Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
Email Screenshot
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
Email Files
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

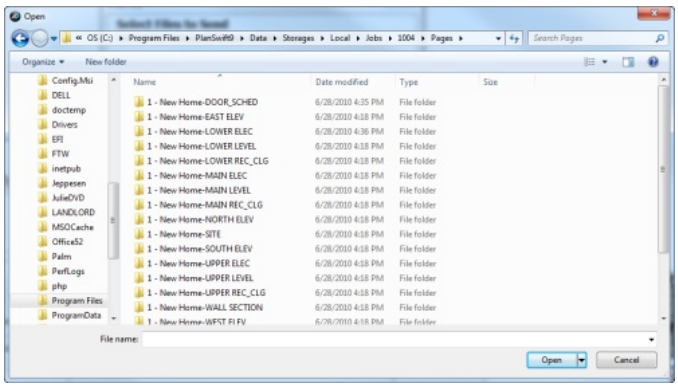
3. Select the 'Add Files' button to browse your files selecting the files you want.

4. Select the files you would like.

    You can delete files if you change your mind or clear the entire list.

5. When you have selected all the files you want select the 'Next' button to continue.

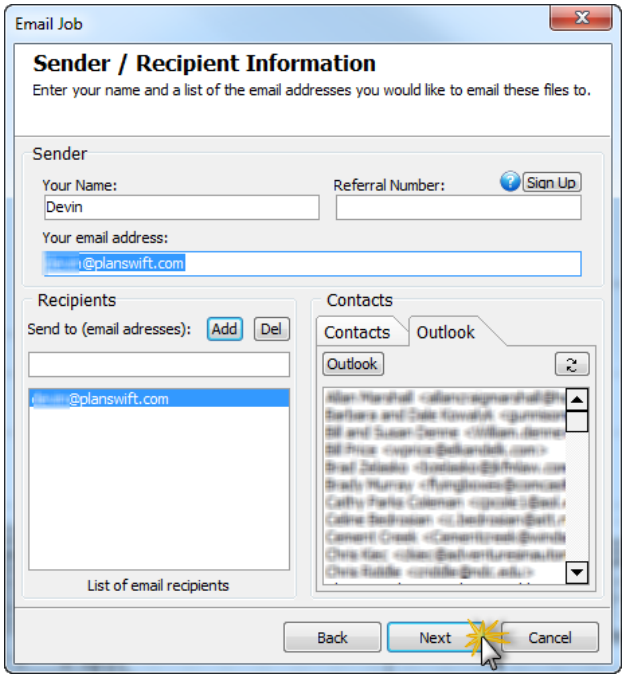




6. Complete the Sender / Recipient Information including your name and email address.

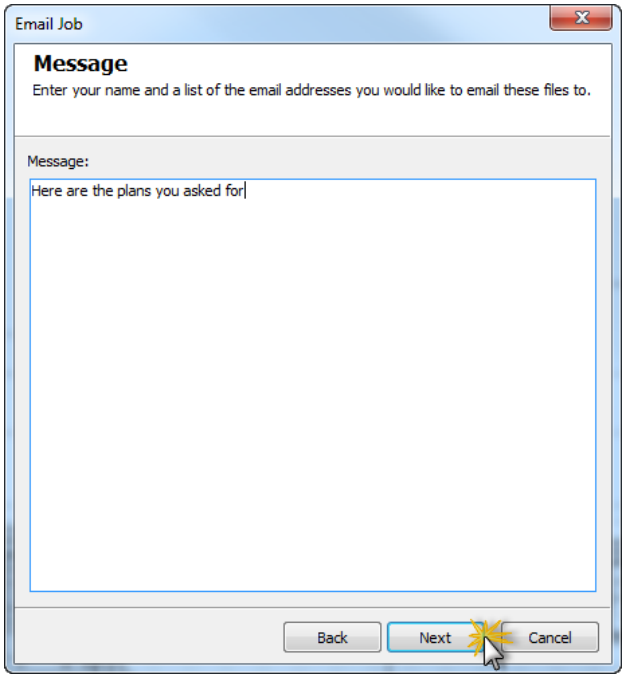
    To add recipients you can type their email address in the box and select 'Add' or choose the name from your Contacts or Outlook list.

7. Click the 'Next' button to continue.



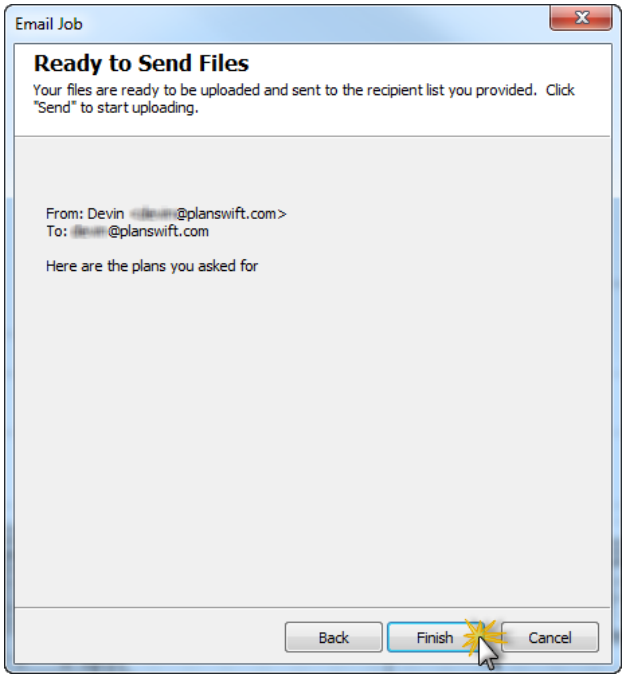
8. Enter a personal message to be sent with your email.

9. Select NEXT to continue.


Email Job
Message
Enter your name and a list of the email addresses you would like to email these files to.
Message:
Here are the plans you asked for
Back
Next
Cancel

10. Confirm the information is correct. If you want to make changes click the 'back' button.

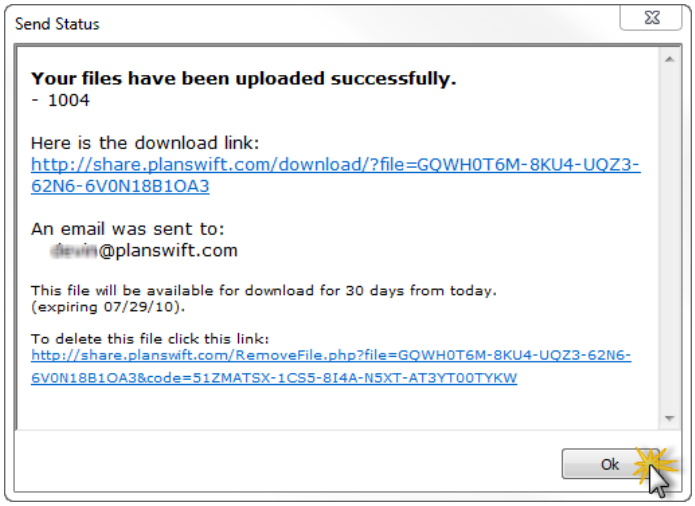
11. Click the 'Finish' button to send your plan files.


Email Job
Ready to Send Files
Your files are ready to be uploaded and sent to the recipient list you provided. Click "Send" to start uploading.
From: Devin @planswift.com>
To: @planswift.com
Here are the plans you asked for
Back
Finish
Cancel

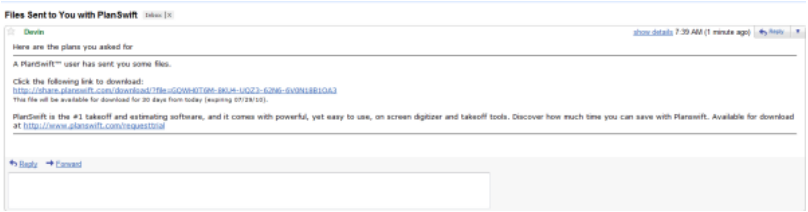
12. Your files will be automatically upload to PlanSwift. When this process is complete you will see a message like this one.

> The download link will allow access to download the plans you are sending. The recipient will also be sent this link and not the plans. This allow them to download and view the plans when they are ready.

13. Click the 'Ok' button to close this box.



The recipient will receive an email like this one that includes your message and a link to download the plans.


Files Sent to You with PlanSwift
Devin
Here are the plans you asked for
A PlanSwift™ user has sent you some files.
Click the following link to download:

To watch a video about Emailing Files, click here.

Posted Mike Ramsey - Jun 29, 2010 at 9:04 AM. This article has been viewed 960 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=345

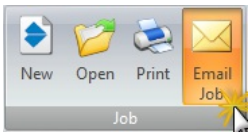
Email Screenshot

Article Number: 344 | Rating: Unrated | Last Updated: Aug 5, 2011 at 11:00 AM

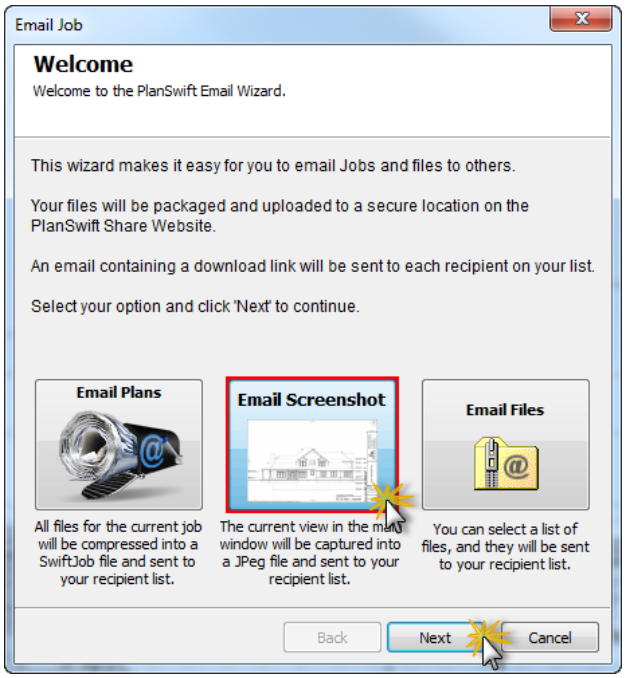
Emailing a screen shot to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email a Screenshot select the 'Email Job' button.

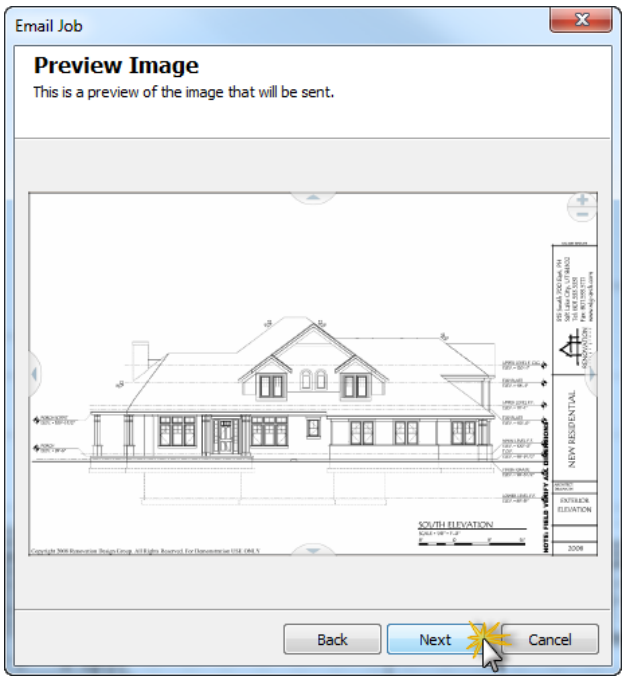


2. Then select 'Email Screenshot' and the 'Next' button to continue.


Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
Email Screenshot
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
Email Files
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

3. Preview the image to confirm it is what you want to send.

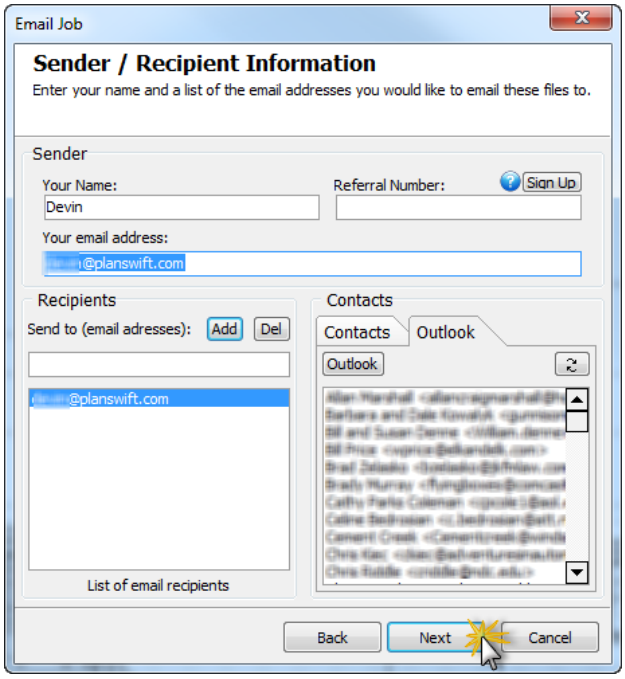
4. Click the 'Next' button to continue.



5. Complete the Sender / Recipient Information including your name and email address.

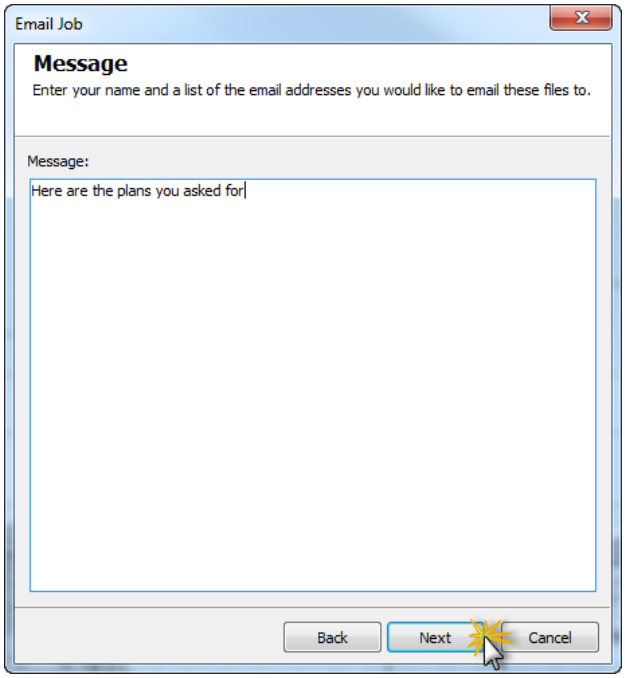
   To add recipients you can type their email address in the box and select 'Add' or choose the name from your Contacts or Outlook list.

6. Select 'Next' to continue.

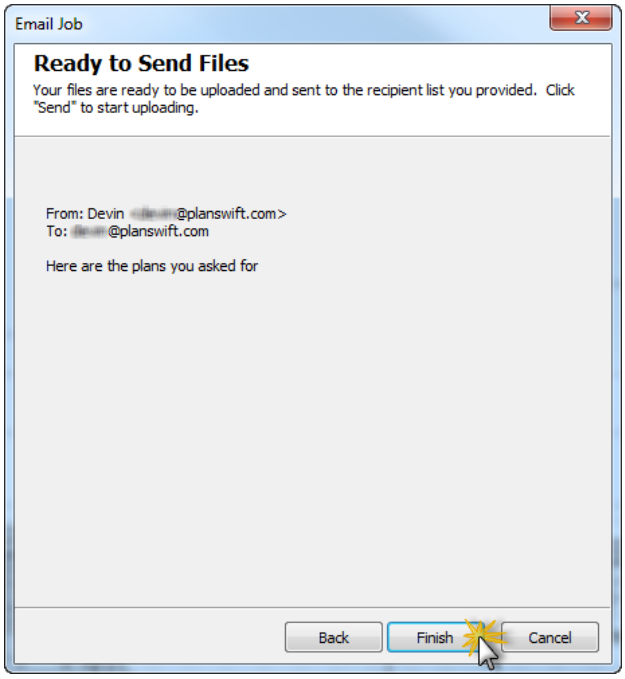


7. Enter a personal message to be sent with your email.

8. Click 'Next' to continue.


Email Job
Message
Enter your name and a list of the email addresses you would like to email these files to.
Message:
Here are the plans you asked for
Back
Next
Cancel

9. Confirm the information is correct. If you want to make changes select the 'Back' button.

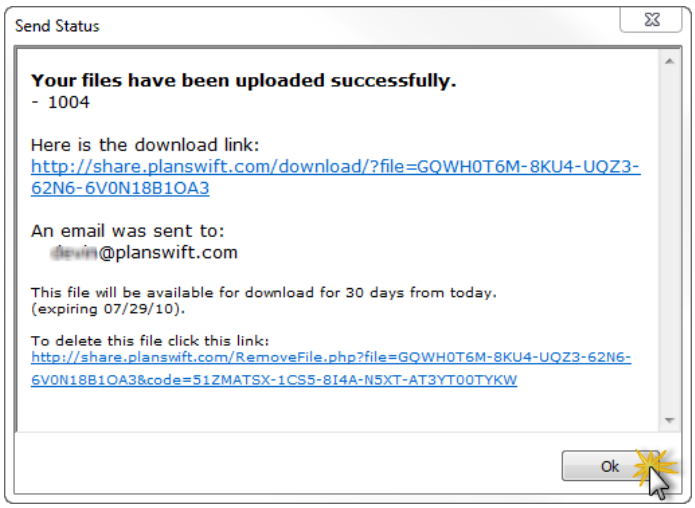

Email Job
Ready to Send Files
Your files are ready to be uploaded and sent to the recipient list you provided. Click "Send" to start uploading.
From: Devin @planswift.com>
To: @planswift.com
Here are the plans you asked for
Back
Finish
Cancel

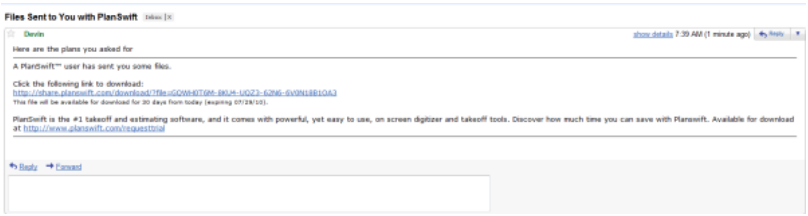
10. Click 'Finish' to send your plans.

11. Your files will be automatically upload to PlanSwift. When this process is complete you will see a message like this one.

> The download link will allow access to download the plans you are sending. The recipient will also be sent this link and not the plans. This allow them to download and view the plans when they are ready.

12. Click the 'Ok' button to close this box.




Files Sent to You with PlanSwift
Devin
Here are the plans you asked for
A PlanSwift™ user has sent you some files.
Click the following link to download:

The recipient will receive an email like this one that includes your message and a link to download the plans.

To watch a video about Emailing Screenshots, click here.

Posted Mike Ramsey - Jun 29, 2010 at 8:35 AM. This article has been viewed 931 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=344

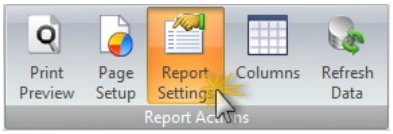
Reports

Report Settings

Article Number: 585 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:35 PM

The Reports Setting section allows you to set the look and feel for reports you run with PlanSwift.

1. Select the 'Report Settings' button to begin.



View Tab - Allows you to set what is viewed on reports.

Show

Caption - When selected displays a top tab or verferance. Here "Cars".

Bands -

Headers - When selected displays headers on the at the top of columns. Here "Name" and "Logo".

Footers - When selected displays footer at the bottom of the page. Here the "Count=4".

Group Footers -

Expand Buttons -

Filter Bar -

On Every Page

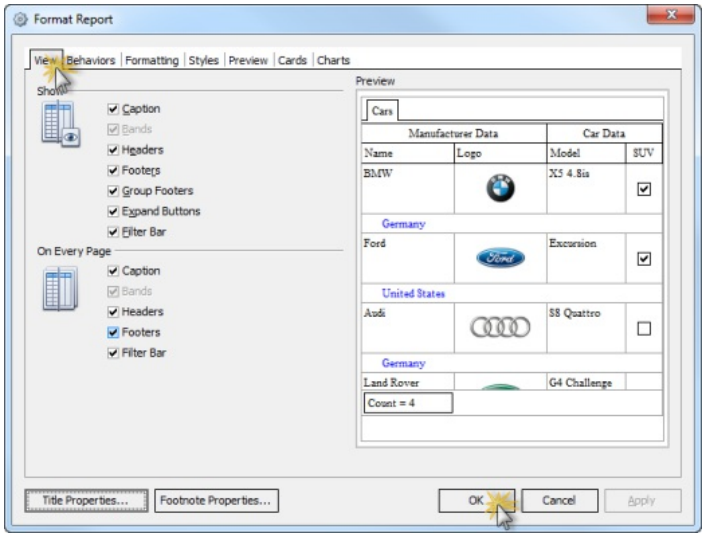
Caption -

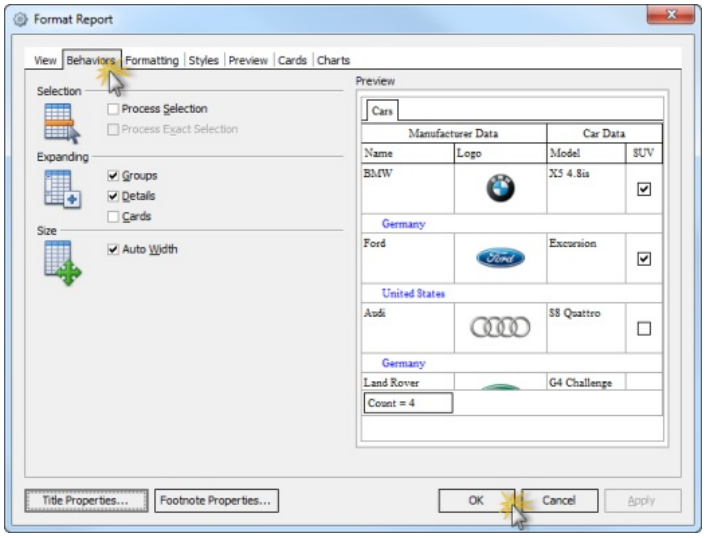
Bands -

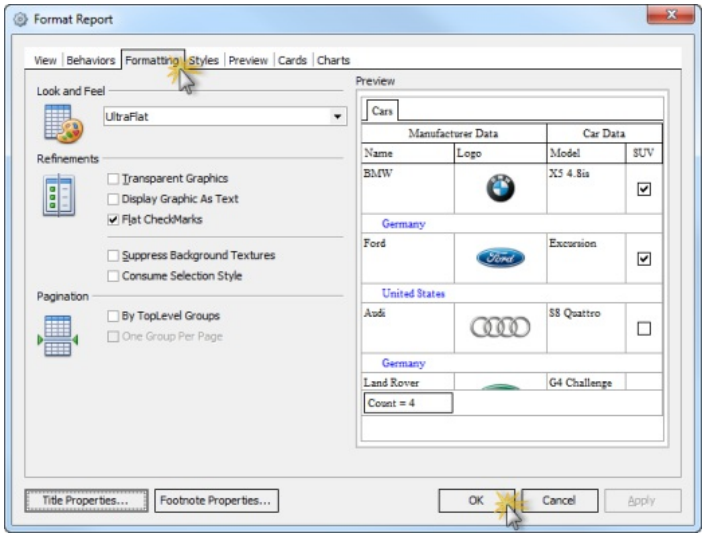
Headers -

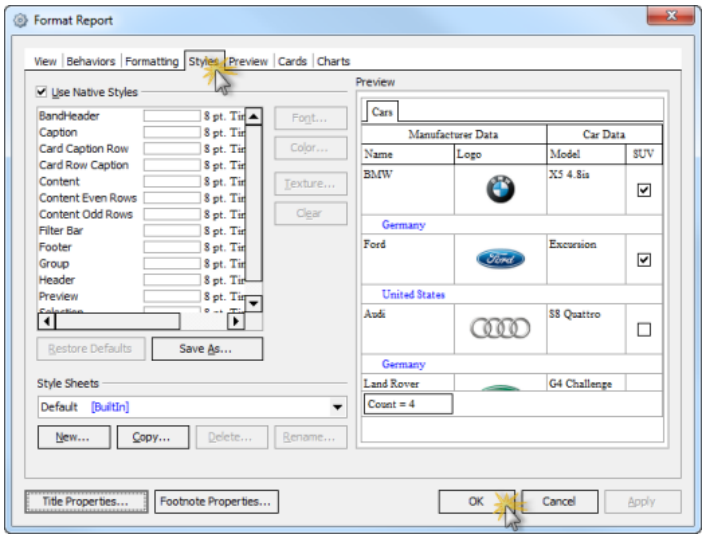
Footers -

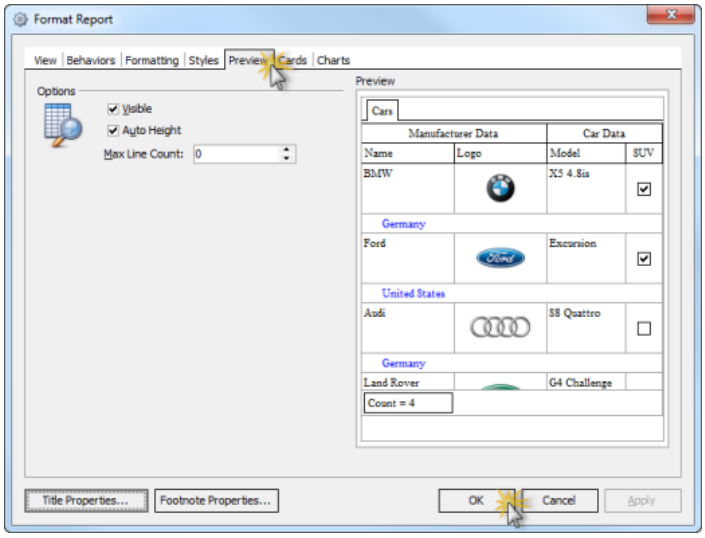
Filter Bar -

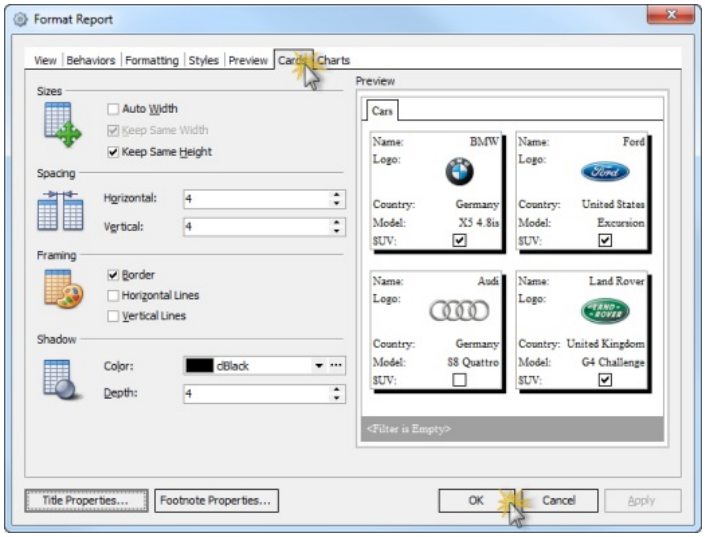


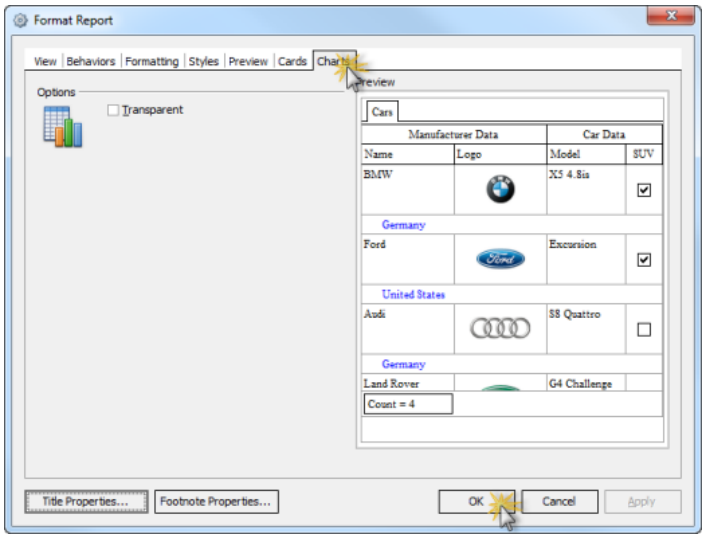

Format Report
View | Behaviors | Formatting | Styles | Preview | Cards | Charts
Selection
Process Selection
Process Exact Selection
Expanding
Groups
Details
Cards
Size
Auto Width
Preview
Cars
Manufacturer Data
Car Data
Name
Logo
Model
SUV
BMW
X5 4.8is
Germany
Ford
Excursion
United States
Audi
S8 Quattro
Germany
Land Rover
G4 Challenge
Count = 4
Title Properties...
Footnote Properties...
OK
Cancel
Apply


Format Report
View | Behaviors | Formatting | Styles | Preview | Cards | Charts
Look and Feel
UltraFlat
Refinements
Transparent Graphics
Display Graphic As Text
Flat CheckMarks
Suppress Background Textures
Consume Selection Style
Pagination
By TopLevel Groups
One Group Per Page
Preview
Cars
Manufacturer Data
Car Data
Name
Logo
Model
SUV
BMW
X5 4.8is
Germany
Ford
Excursion
United States
Audi
S8 Quattro
Germany
Land Rover
G4 Challenge
Count = 4
Title Properties...
Footnote Properties...
OK
Cancel
Apply


Format Report
View | Behaviors | Formatting | Styles | Preview | Cards | Charts
Use Native Styles
BandHeader
Caption
Card Caption Row
Card Row Caption
Content
Content Even Rows
Content Odd Rows
Filter Bar
Footer
Group
Header
Preview
Font...
Color...
Texture...
Clear
Restore Defaults
Save As...
Style Sheets
Default [BuiltIn]
New...
Copy...
Delete...
Rename...
Preview
Cars
Manufacturer Data
Car Data
Name
Logo
Model
SUV
BMW
X5 4.8is
Germany
Ford
Excursion
United States
Audi
S8 Quattro
Germany
Land Rover
G4 Challenge
Count = 4
Title Properties...
Footnote Properties...
OK
Cancel
Apply





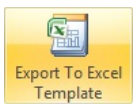


Posted Mike Ramsey - Jul 2, 2010 at 11:49 AM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=585

Export to Excel Template

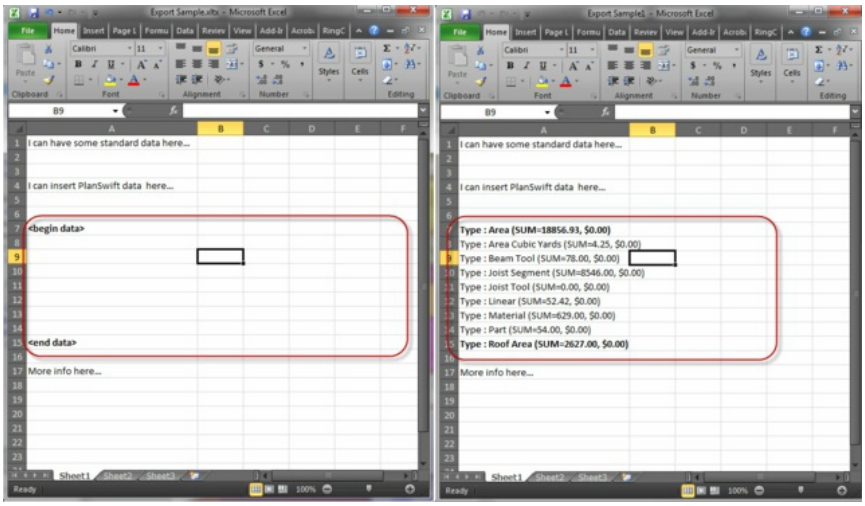
Article Number: 595 | Rating: Unrated | Last Updated: Sep 21, 2012 at 6:51 PM



PlanSwift has the ability to export report data to a defined section of an existing excel template. This allows you to have a predefined header of information that is static and them populate an area of it with the PlanSwift data.made it easy to export reports to an Excel Template format.

First you will need to set up your excel sheet and define where the data will be populated. This is a pretty simple task. The two commands to add to your template are:

- **<begin data>**
- **<end data>**


I can have some standard data here...
I can insert PlanSwift data here...
<begin data>
<end data>
More info here...
Type : Area (SUM=18856.93, $0.00)
Type : Area Cubic Yards (SUM=4.25, $0.00)
Type : Beam Tool (SUM=78.00, $0.00)
Type : Joist Segment (SUM=8546.00, $0.00)
Type : Joist Tool (SUM=0.00, $0.00)
Type : Linear (SUM=52.42, $0.00)
Type : Material (SUM=629.00, $0.00)
Type : Part (SUM=54.00, $0.00)
Type : Roof Area (SUM=2627.00, $0.00)

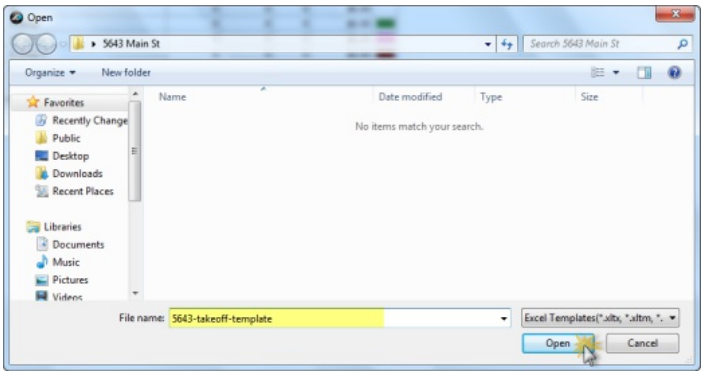
On the left you see the Template file .xltx or .xlt - On the right you see the exported data that has populated between the data tags.

There is one caveat to this the space between the data tags must be large enough to accept the amount of data coming from PlanSwift.

Once your template is set up you can configure the report to show the data you need to export and follow these steps to export.

1. Select the 'Export to Excel Template' button.

2. Enter or browse to the location of the Excel Template file. The template file must contain the proper syntax for the exported data to display.



3. Click open.
4. Once the file opens the data should be populated.
5. Edit and save the Excel file as needed.

Posted Mike Ramsey - Jul 7, 2010 at 10:33 AM. This article has been viewed 2833 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=595

Export to Excel

Article Number: 588 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:36 PM

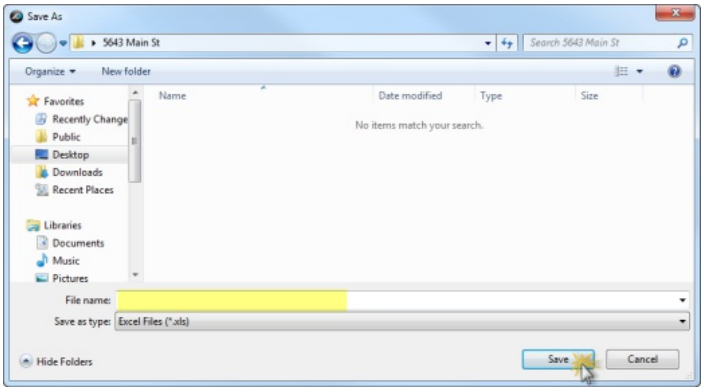
PlanSwift has made it easy to export reports to Excel spreadsheets.

1. Select the 'Export to Excel' button.

2. Enter or browse to the location you want to save the Excel file.

3. Enter the file name.

4. Click 'Save' to save the file. The window will close automatically when complete.



Posted Mike Ramsey - Jul 2, 2010 at 1:00 PM. This article has been viewed 2676 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=588

Report Layout

Article Number: 593 | Rating: 1/5 from 1 votes | Last Updated: Jul 28, 2011 at 11:19 AM

The report layout allows you to select the look and content of reports. You can select from predefined reports or create your own.

1. Allows you to create a New Folder.

2. Allows you to save the current report layout for later recall.

3. Allows you to add a new report layout.

4. Allows you to delete the current report layout.

5. Allows you to refresh the Report List.

6. Allows you to edit the properties of the selected Report.

Basic - The simplest of the report layouts show basic icon, name, and digitizer information.

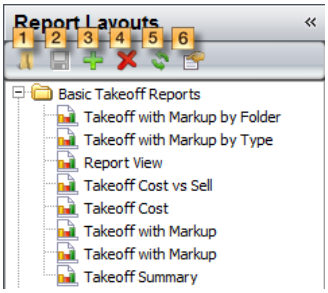
Estimate with Markup - Show your estimate numbers along with any markups you may have.

Estimate - Customer Copy - Show the same information as the Estimate with Markup but without the markup information for viewing by customers.

Request for Quote - Provides the necessary information for other contractors to give you quote on work.

By Location - Breaks the report down by location if you are working with multiple location on one report, such as multiple houses or office units.

Report View - Provides you will all the information available for the reports.



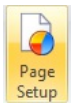
You can customize these reports or create new report layouts anytime you want.

Posted Mike Ramsey - Jul 7, 2010 at 9:38 AM. This article has been viewed 2296 times.

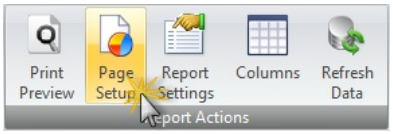
Online URL: http://www.planswift.com/phpkb/article.php?id=593

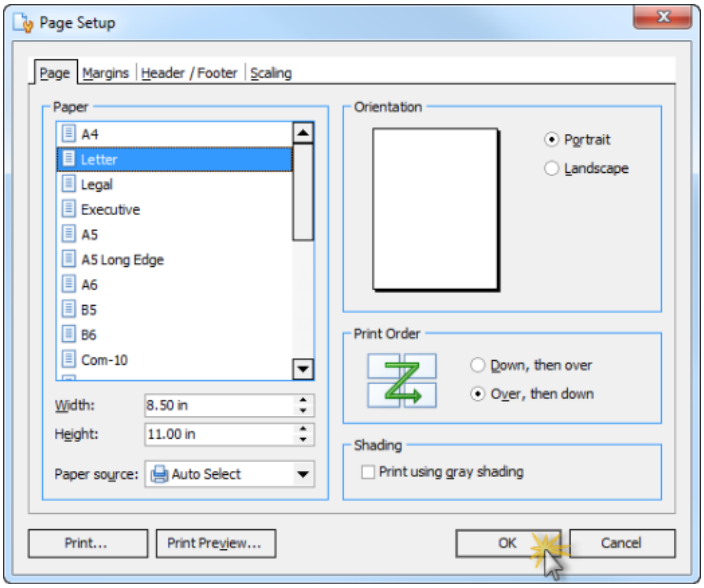
Page Setup

Article Number: 584 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:34 PM



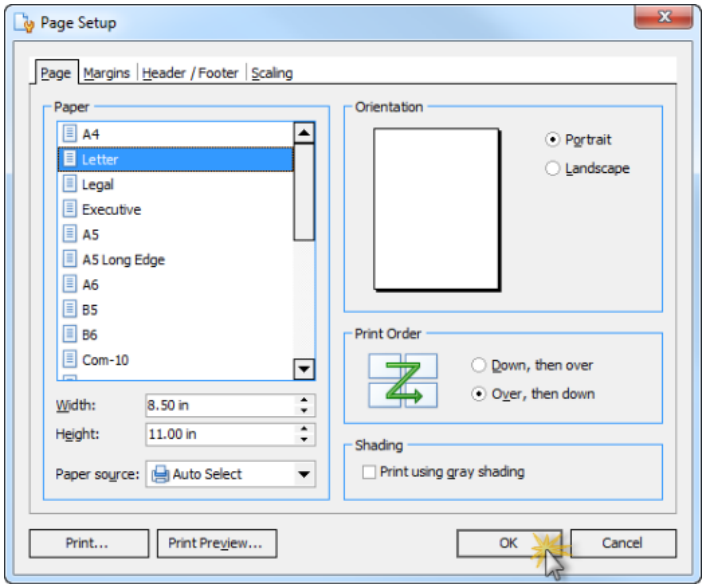
The 'Page Setup' button allows you to set details about the report page layout, such as paper size, orientation, margins and scaling. Specific settings may vary based on your printer manufacture options.



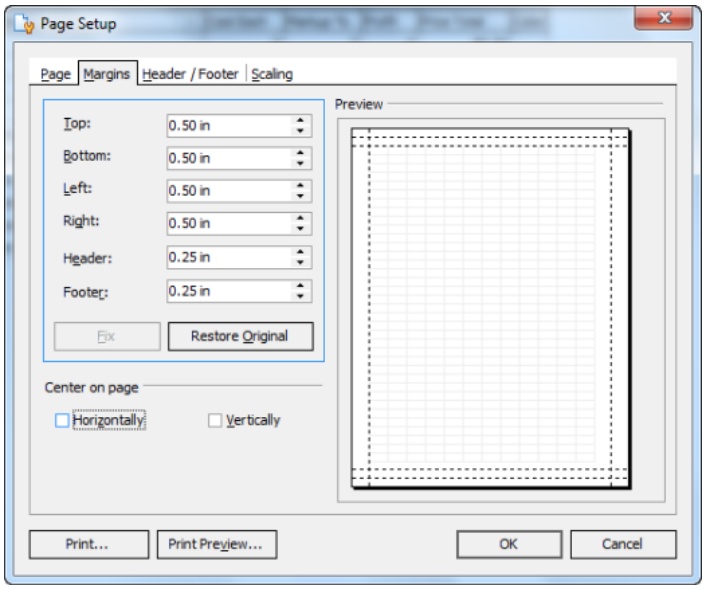


When all is set as you like you can click the 'Print' button to print or the 'OK' button to close the window.

Page Tab - Allows you to set the paper size, source and order pages print in when the plan is bigger than one sheet of paper.



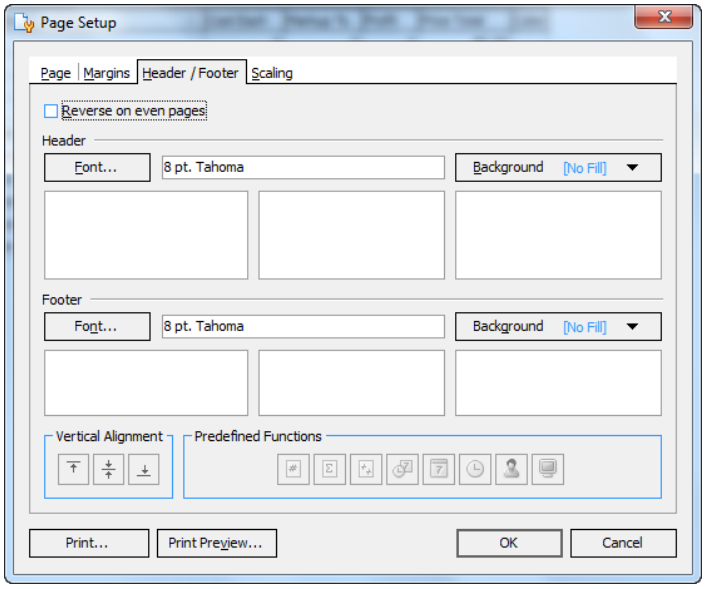
Margins Tab - Allows you to set the margins around the paper and to select if you want the material centered on the page.



Header/Footer Tab - Allows you to add headers and footers to all pages of you printed document.

You can select the font type, color and size, and background color, along with what you want the header or footer to say.

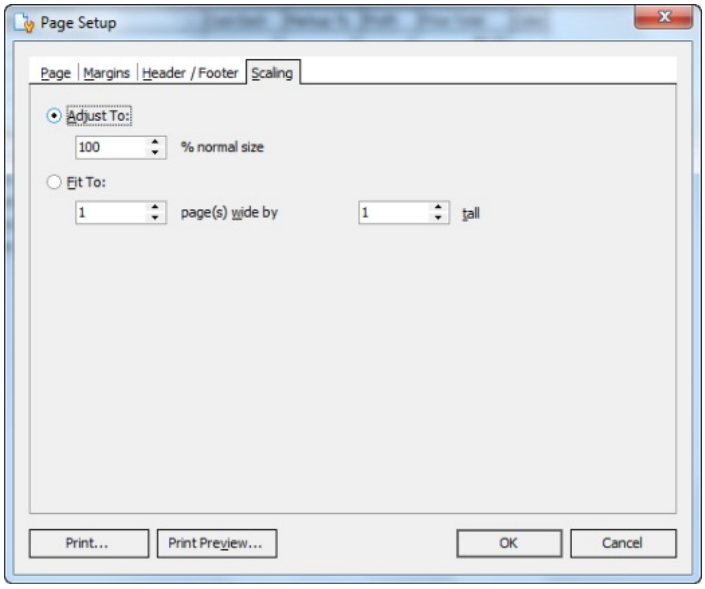
PlanSwift has several useful predefined functions you can add to any part of you footer or header by first selecting the placement of the item then clicking on the function.



Scaling Tab - Allows you to set the scaling size of the report.

Adjust To - Scales the document to a percentage of original size from 1% and up.

Fit To - Scales the pages to fit multiple pages on a single sheet of paper.



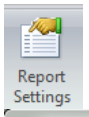
Posted Mike Ramsey - Jul 2, 2010 at 11:24 AM. This article has been viewed 1906 times.

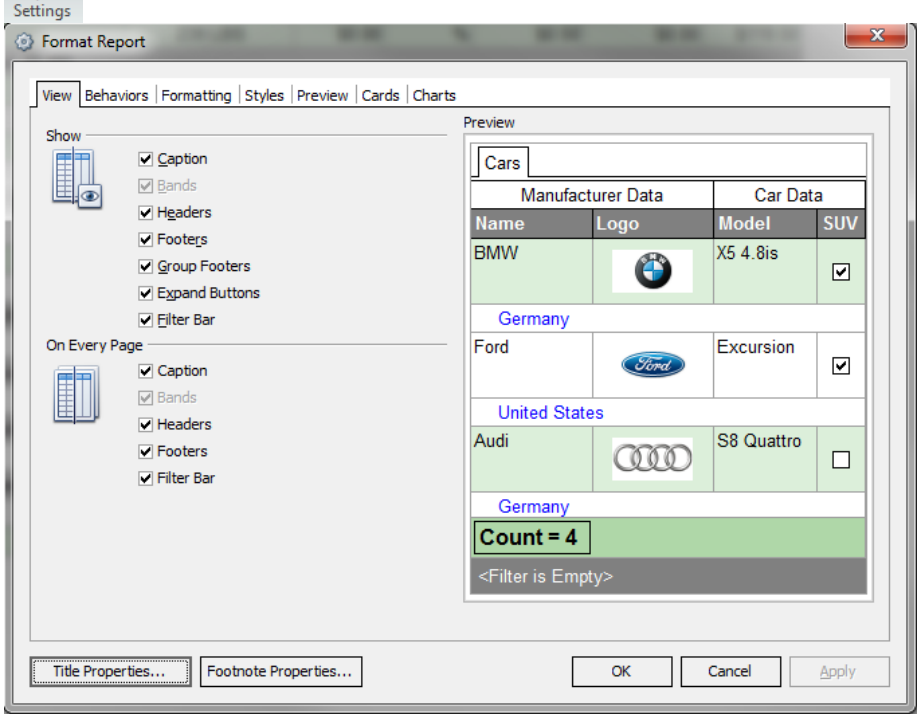
Online URL: http://www.planswift.com/phpkb/article.php?id=584

Report Formatting

Article Number: 1808 | Rating: Unrated | Last Updated: Jul 26, 2011 at 1:56 PM

Report Formatting refers to the appearance of the actual report. This allows you to edit fonts, color schemes, page set up, headers and footers. Each report is handled independently, so every report can be different. To begin, click on the Report Settings button, which will open the Format Report window.





There are several tabs in that window, some of which are not used inside PlanSwift. The main tabs that most user will edit are the View, Behaviors and Styles. The first tab is the View tab. This tab allows you to edit what report components are visible. The next tab is the Behaviors tab. Here, you can edit how your report will behave. For example, the Process Selection option will make the report show only what you have selected within that report. The Expanding options will automatically expand all sub items that are collapsed so they are able to be seen when printed. Under the Formatting Tab, it is recommended to leave it set at Ultra Flat. The Styles tab is where you can edit fonts and color schemes. Add a title to your Report, click on the Title Properties button at the bottom of the window. You can use

properties in the Title Properties and Footnote Properties. For example, to add the Job Name to the report title simply enter [\Job\Name].

Another option for formatting your report is Page Setup. Click on the Page Setup button to open the window where you can adjust how the Report will print. Such options include printing the Report portrait or landscape, adjusting margins, headers and footers, Page size and Scaling.

Posted Mike Ramsey - Jul 26, 2011 at 1:37 PM. This article has been viewed 1530 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1808

Print Reports

Article Number: 596 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:37 PM

Printing report with PlanSwift is quick and easy.

1. Select the 'Print' button to start.

2. Select the print you want to print to from the drop down menu. You default printer should be already listed.

3. Select the Pages you want printed.

    All - Will print all the pages.

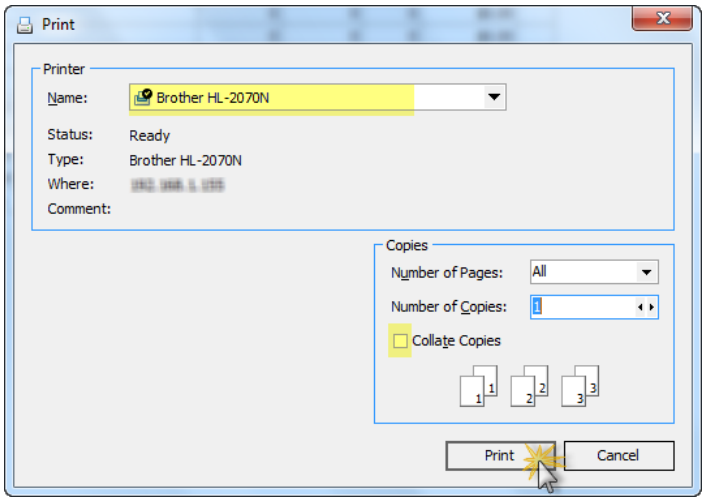
    Even - Will print the even numbered pages.

    Odd - Will print the odd numbered pages.

4. Select the number of copies you want made.

5. Select the the 'Collate Copies' check box if you are printing multiple copies and want the copies collated.

6. Click 'Print' to start the printing process. The window will close when the task is completed.



Posted Mike Ramsey - Jul 7, 2010 at 10:48 AM. This article has been viewed 1290 times.

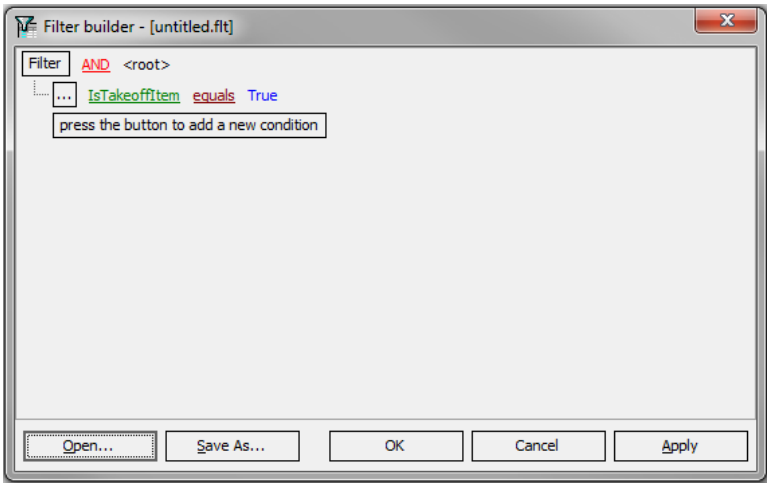
Online URL: http://www.planswift.com/phpkb/article.php?id=596

Report Filters

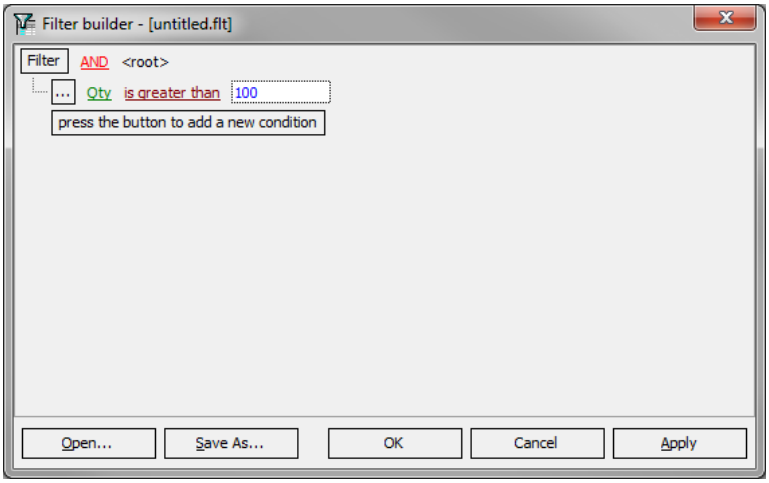
Article Number: 1802 | Rating: Unrated | Last Updated: Jul 26, 2011 at 2:09 PM

Report Filters determine what actually shows up in the report. PlanSwift uses the 5 typical cost categories; Subcontract, Material, Labor, Equipment and Other, you can create other categories as well. To edit the filter, click on the Customize button in the lower right corner of the screen.

This will bring up the Filter Builder window. Here, you will choose what data you want to filter, the operator for the filter, and the criteria youâ€™re filtering for.

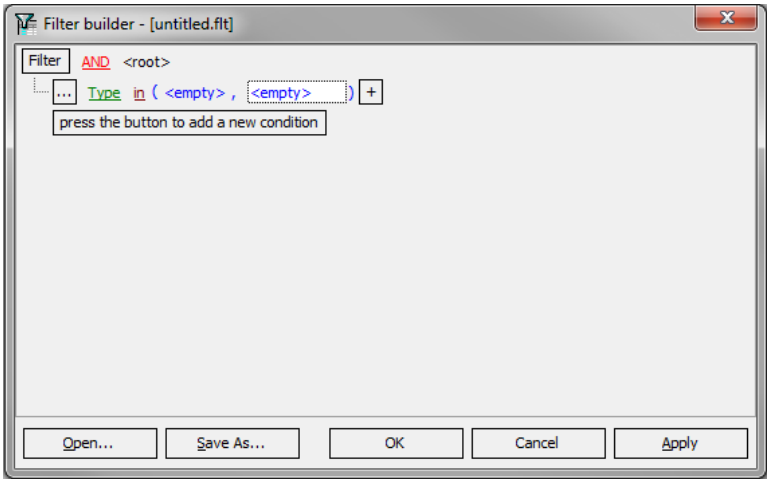


By clicking the green highlighted words, you can choose what you would like to filter, such as quantity, type, folder etc. This list is generated by what columns you have defined for the report. Then, by clicking the red highlighted word, you can select what operation you want the filter to perform. Finally, by clicking the blue highlighted word, you choose specifically what criteria your filter will follow.

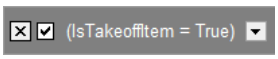


For example, you can set a filter for Quaintly (Qty), is greater than, 100. This filter will show all the items where the Quantity is greater than 100.

At times, you can select more than one operation for the filter.



You can have as many different conditions to your filter as you would like, simply click on the new condition button. Once you have created your filter, click â€˜applyâ€™ in order to run the filter. You can save your filter for future use by clicking â€˜Save asâ€™, and you can also view a history of recently used filters by clicking the down arrow next to the filter at the bottom of the screen.



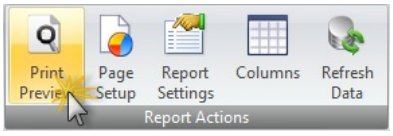
Posted Mike Ramsey - Jul 25, 2011 at 2:30 PM. This article has been viewed 1206 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1802

Print Preview

Article Number: 583 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:34 PM

The 'Print Preview' button will allow you to see what your report will look like when printed. See also Page Setup to modify how the page will print.



Posted Mike Ramsey - Jul 2, 2010 at 11:16 AM. This article has been viewed 1189 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=583

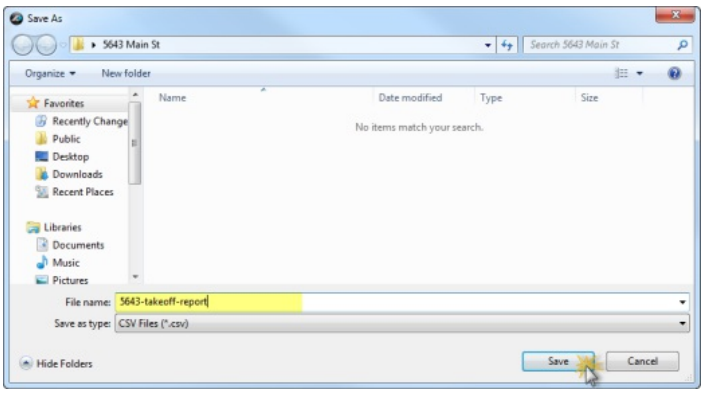
Export to CVS

Article Number: 589 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:36 PM

PlanSwift has made it easy to export reports to CSV spreadsheets.

1. Select the 'Export to CSV' button.

2. Enter or browse to the location you want to save the CSV file.
3. Enter the file name.
4. Click 'Save' to save the file. The window will close automatically when complete.



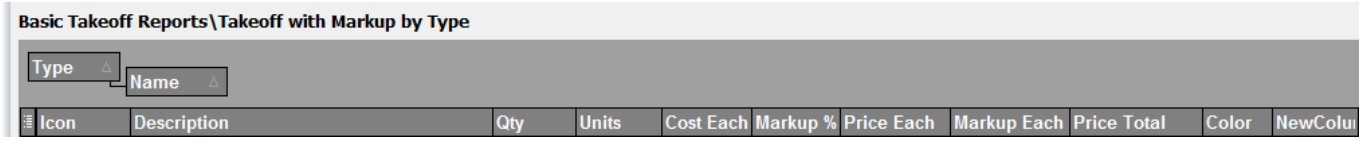
Posted Mike Ramsey - Jul 2, 2010 at 1:06 PM. This article has been viewed 1125 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=589

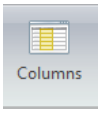
Report Grouping

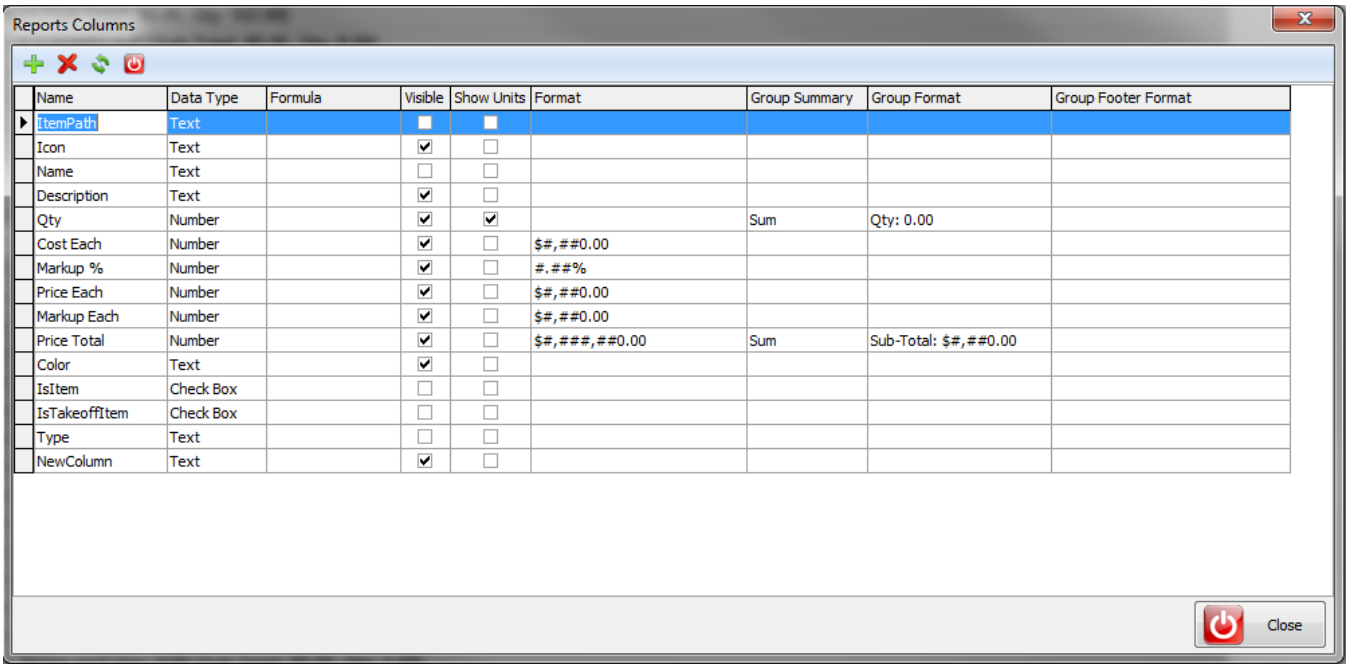
Article Number: 1804 | Rating: Unrated | Last Updated: Jul 26, 2011 at 9:57 AM

In your Reports, you have the ability to group your data by the column headings that are visible. The Grouping takes place in the light grey bar at the top of the report.



In order to group by a certain criteria, simply click and drag the column heading into the light grey bar. There is no limit to how many columns you have visible in a report. You may edit your columns by clicking on the Columns button.





To add a new column, simply click the green â€˜+â€™ button and type in the column name. Be sure to set the correct data type when adding your columns.

By default, each column should match a property name inside your items; this is the only way to yield a result. A formula can also be created for a column by typing it in the Report Columns window. You can group by any column, and you may have as many groupings as you would like. Grouping is a great way to keep Reports clean and organized in order to make the data easily accessible.

Posted Mike Ramsey - Jul 26, 2011 at 9:50 AM. This article has been viewed 1056 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1804

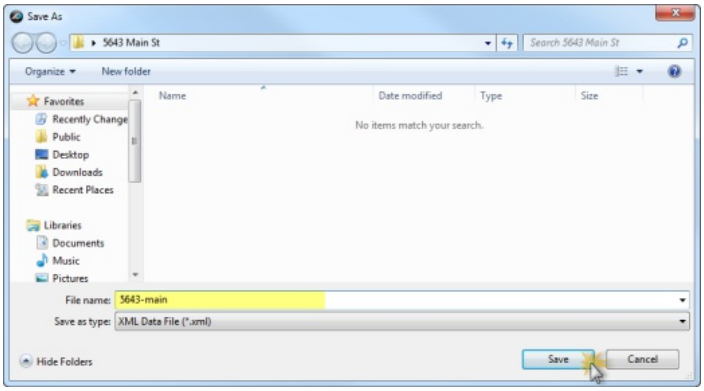
Export to XML

Article Number: 590 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:36 PM

PlanSwift has made it easy to export reports to XML format.

1. Select the 'Export to XML' button.

2. Enter or browse to the location you want to save the XML file.
3. Enter the file name.
4. Click 'Save' to save the file. The window will close automatically when complete.

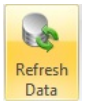


Posted Mike Ramsey - Jul 2, 2010 at 1:11 PM. This article has been viewed 1046 times.

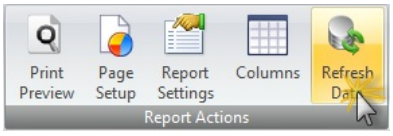
Online URL: http://www.planswift.com/phpkb/article.php?id=590

Refresh Data

Article Number: 587 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:35 PM



The 'Refresh Data' button reloads the data in the reports updating any changes you may have made outside of the reports section.



Posted Mike Ramsey - Jul 2, 2010 at 12:52 PM. This article has been viewed 1027 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=587

New Report

Article Number: 1807 | Rating: Unrated | Last Updated: Jul 26, 2011 at 2:10 PM

Creating a new custom Report in PlanSwift allows you to view data and information that fits the criteria you need. If you go to the Reports tab now, you will see all of the default reports that PlanSwift offers, as well as any custom reports that you may have created. Select one of the reports format that is closest to what you are looking for, and click the green â€¯+â€™ button under Report Layouts. This will open a window where you can rename the new Report you are about to customize. From there start filtering based on what you would like to see. Essentially, Reports have a few key components; Filters, Columns and Grouping. These allow you to edit the report to show what information you need and how it is organized.

Filters search through all of your data and extract information based on the criteria that you set thus reducing the results to only the items you need. Columns will report the property values that are stored on the items you filtered for. Grouping allows you to organize the results in a meaningful way.

For more information about Filters, click here or watch the Video Here.

For more information about Grouping & Columns, click here.

Posted Mike Ramsey - Jul 26, 2011 at 11:45 AM. This article has been viewed 974 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1807

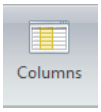
About Reports

Article Number: 1799 | Rating: Unrated | Last Updated: Jul 26, 2011 at 2:16 PM

Reports are an importantl part of PlanSwift. They give you a way of presenting the data about your Items in a logical format. In the Reports tabs, you will have a default listing of different reports. Each report is specific to its filter such as the example shown here.

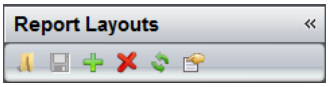
This example demonstrates a filter that is set to filter items that are takeoff or digitizer items only.

The Filter searches through your project and displays the information based on the conditions you set in your filter query. The default Reports in PlanSwift are organized by different types; Takeoff (all digitized items), Subcontract, Material, Labor, Equipment and Other. Basically the 5 common cost categories. Within these Reports, you can customize what information is displayed from the items with the Columns. Each column is specific to a certain property such as quantity, units, cost etc. There is no limit to how many columns are present, but the column should be the same name as an item property. To create a new column, simply click on the columns button at the top.



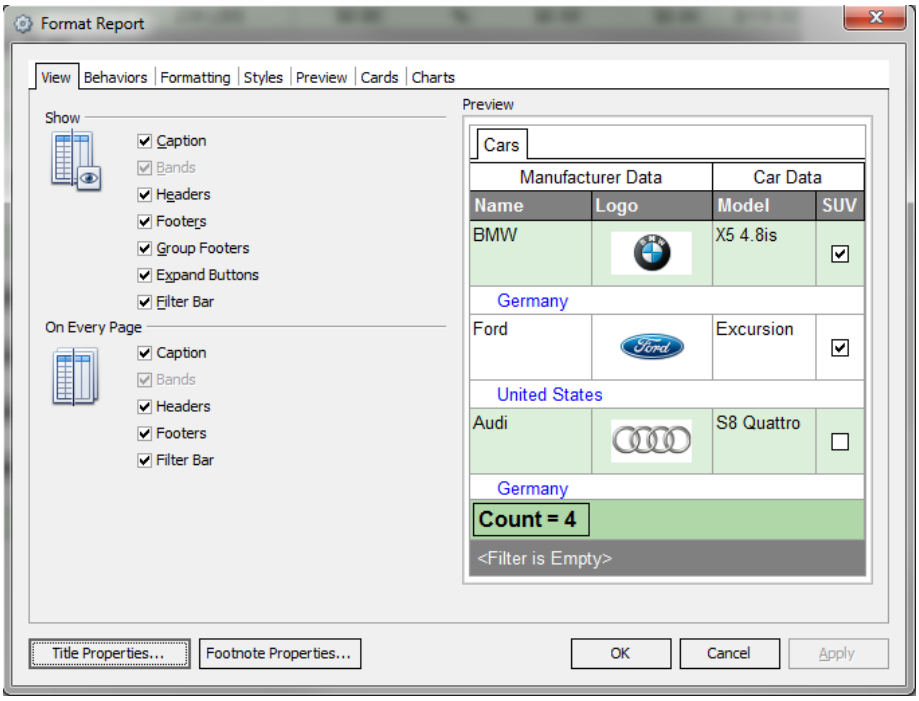
You can also select which columns you would like to be visible within a report. For more information about Columns, click here.

To create a new Report, first select an already existing Report, and then click on the green plus â€˜+â€™ button under Report Layouts.



Doing this will create an exact copy of that report, and from there you can customize that new report to fit your needs whether by the filter or visible columns.

To adjust the appearance of your reports, click on the Report Settings button.



More detailed information can be found here.

Posted Mike Ramsey - Jul 25, 2011 at 1:09 PM. This article has been viewed 907 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1799

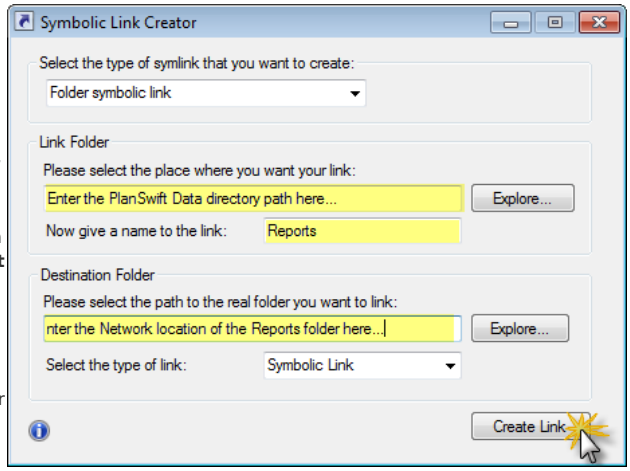
Sharing Reports

Article Number: 1805 | Rating: Unrated | Last Updated: Jul 26, 2011 at 11:09 AM

In order to share your Reports with other users, search for PlanSwift 9 directory in your program files. Once inside the directory, click on data, you will see a Reports folder. From there, select the Reports you would like to share, and simply copy them by right clicking and selecting copy. The simplest method would be to just copy the reports to a thumb drive or onto a network location that is accessible from other computers, from there other users can copy and paste it into their Reports Directory on their computer.

There is another way to share Reports by using a third party application available from Google. The program is called Symlinker.

Additional information regarding the SymLinker application used in this video can be found HERE
Please Note: This application is not supported by PlanSwift


Symbolic Link Creator
Select the type of symlink that you want to create:
Folder symbolic link
Link Folder
Please select the place where you want your link:
Enter the PlanSwift Data directory path here...
Explore...
Now give a name to the link:
Reports
Destination Folder
Please select the path to the real folder you want to link:
nter the Network location of the Reports folder here...
Explore...
Select the type of link:
Symbolic Link
Create Link

This program creates a symbolic link, similar to a shortcut, which will read the contents of another directory, then places it into the directory which is located in your data directory.

1. Copy the report directory to a network location that all users have access to (this is only done once)
2. Once copied delete the original reports folder in the PlanSwift Data directory
3. Run the SymLinker application
4. Enter the information as indicated in the image
5. Press the Create Link button.
6. You will need to create a symlink on all of the other computers that need it.
7. Restart PlanSwift

Posted Mike Ramsey - Jul 26, 2011 at 10:54 AM. This article has been viewed 875 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1805

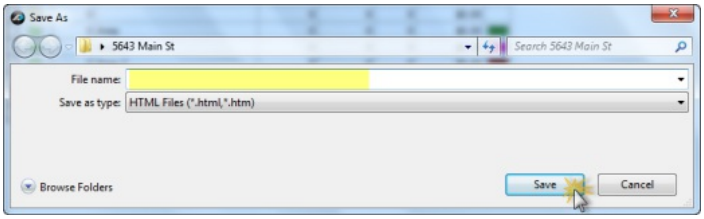
Export to HTML

Article Number: 594 | Rating: Unrated | Last Updated: Aug 5, 2010 at 4:37 PM

PlanSwift has made it easy to export reports to HTML format.

1. Select the 'Export to HTML' button.

2. Enter or browse to the location you want to save the HTML file.
3. Enter the file name.
4. Click 'Save' to save the file. The window will close automatically when complete.



Posted Mike Ramsey - Jul 7, 2010 at 10:23 AM. This article has been viewed 840 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=594

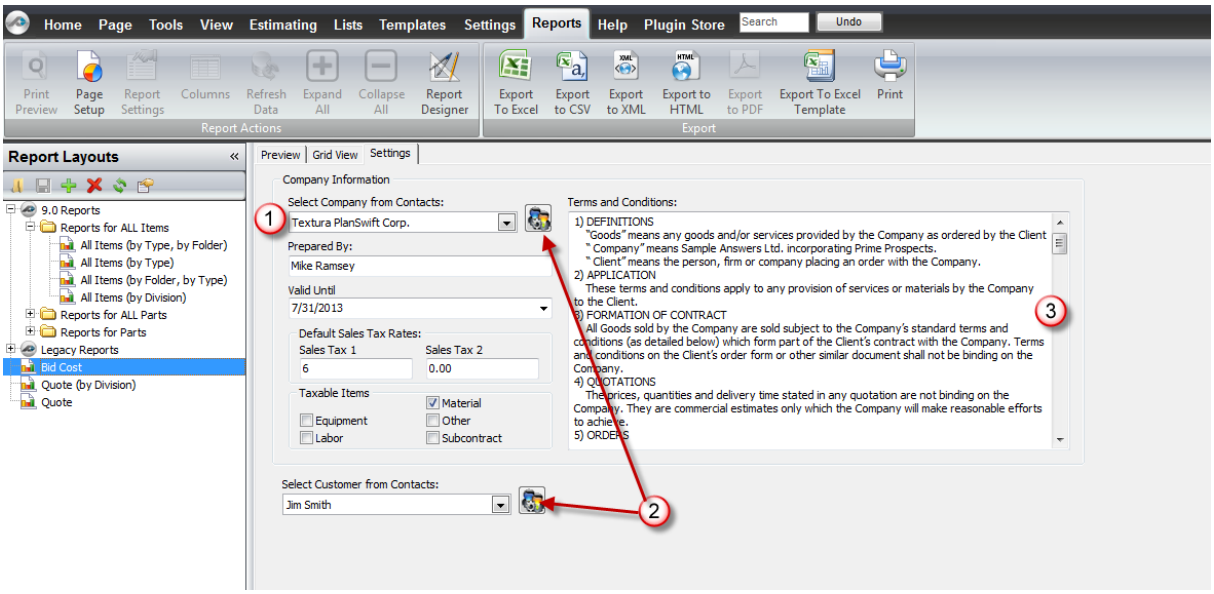
SwiftReports Basic

Article Number: 2284 | Rating: 2/5 from 1 votes | Last Updated: Jul 4, 2013 at 4:10 PM

SwiftReports is the new report engine for PlanSwift version 9.5 and later. We have added many new features that have been requested by our customers.

Features include a more formal appearance, customer address book, multiple tax rates, terms and conditions for the estimate.

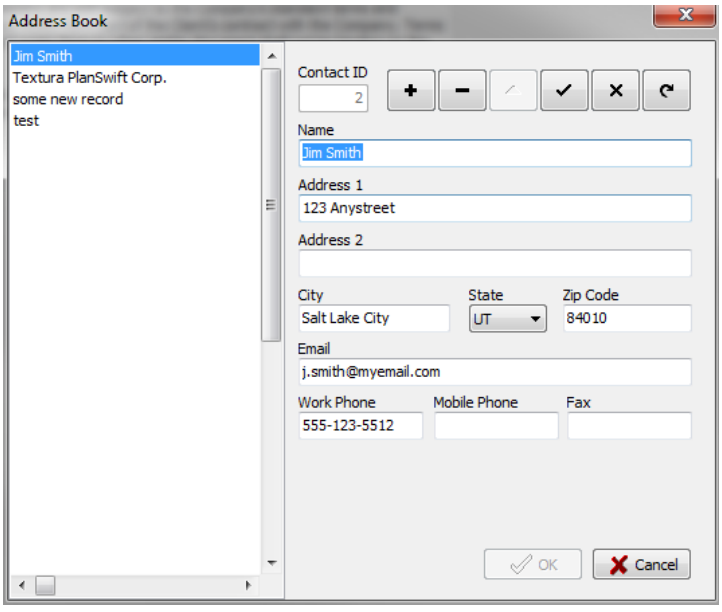
Optional: An available report designer to create fully customizable reports including custom calculations, colored graphs and charts, images, logos, backgrounds and more.



1. Enter your company information (Company Name select from address book). Enter job specifics such as tax rates, who prepared the estimate, How long the estimate is valid, which items are taxable and who the customer is that it is prepared for.

2. Clicking either of the buttons will open the address book editor. This allows you to add new contacts to your address book.

3. Terms and Conditions: Here you can type out or paste in from another document any of your standard terms for the estimate.



In the Contact Editor you can add, edit and Delete contacts.

Clicking the preview tab on the report screen will display the new report preview. When using the grid view the old style report tools are still available just as they have been in the past.

The Report Designer is available as a plugin and is only required if you wish to fully customize the look of all of your reports. Con

Posted Mike Ramsey - Jul 4, 2013 at 3:30 PM. This article has been viewed 577 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2284

The How To Section

The How To Section

Article Number: 2274 | Rating: Unrated | Last Updated: Mar 29, 2013 at 3:21 PM

This is a test

Posted Mike Ramsey - Mar 29, 2013 at 3:21 PM. This article has been viewed 21 times.

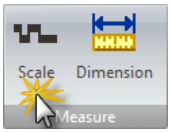
Online URL: http://www.planswift.com/phpkb/article.php?id=2274

Job Management

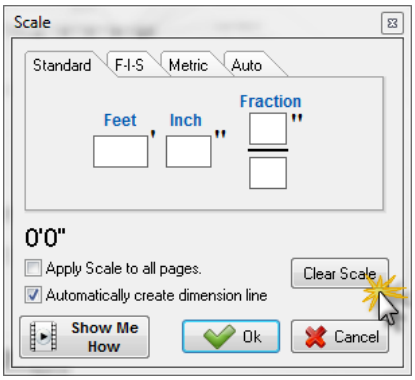
How To Remove a Scale

Article Number: 1819 | Rating: Unrated | Last Updated: May 29, 2012 at 9:19 PM

To remove a scale from a page, first make sure to select that desired page. Once you have the page selected, click on the 'Scale' button in the 'Home' tab.



Simply click the 'Clear Scale' button, and the scale will be removed from that page.



To watch a video on how to remove a scale, click here.

Posted Mike Ramsey - Aug 2, 2011 at 1:55 PM. This article has been viewed 2252 times.

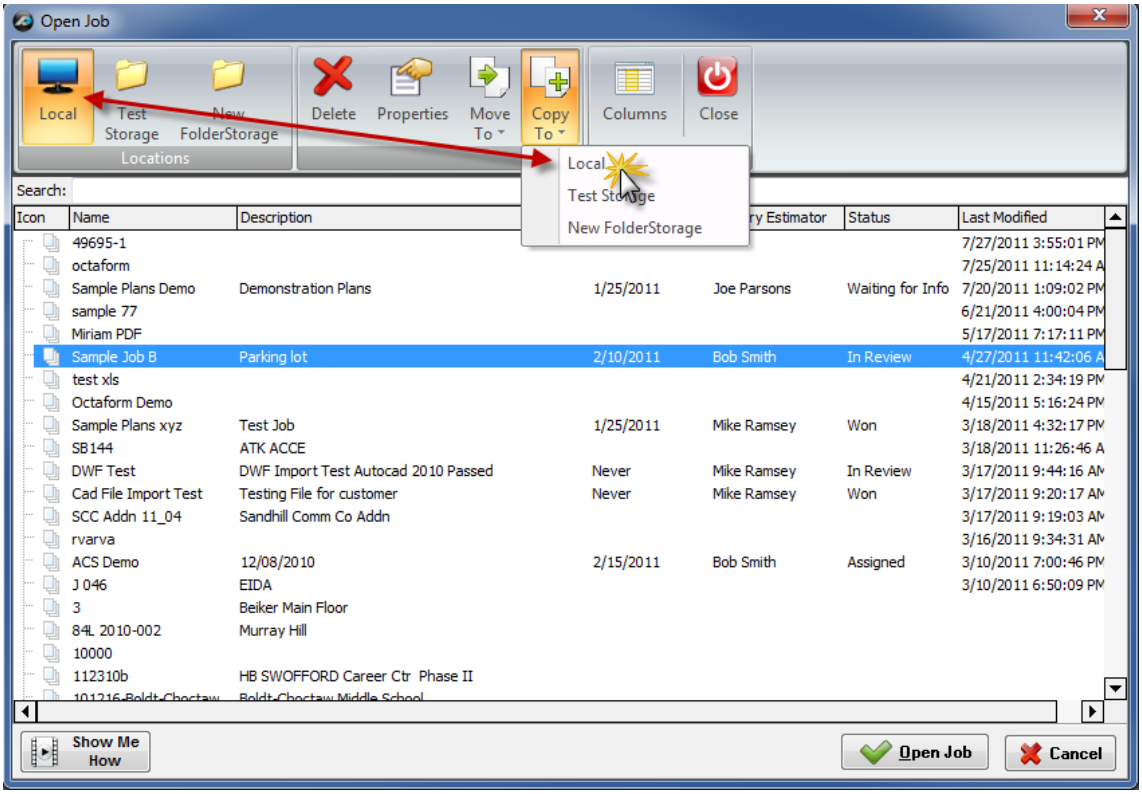
Online URL: http://www.planswift.com/phpkb/article.php?id=1819

How to copy a job

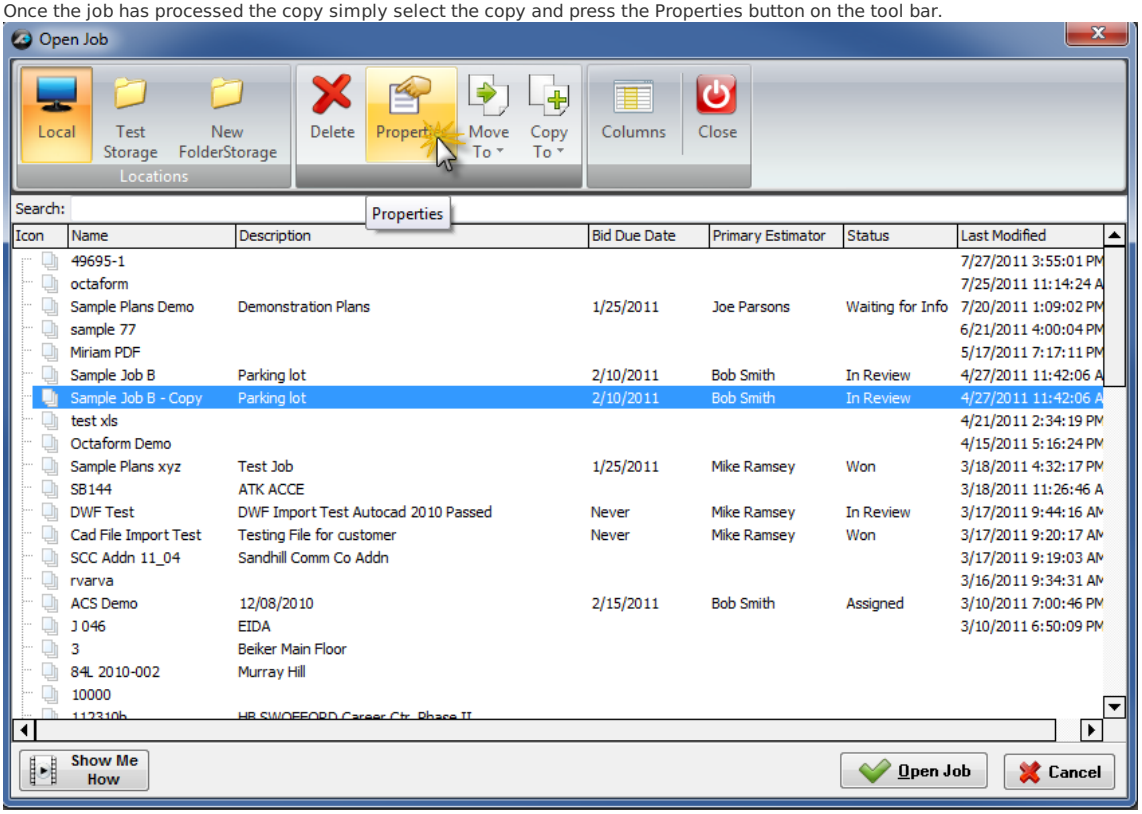
Article Number: 1815 | Rating: Unrated | Last Updated: Aug 1, 2011 at 2:34 PM

If you would like to make a copy of an existing PlanSwift job just follow these steps.

1. Go to the Open button on the home tab and open the job list.
2. Select the project from the list that you want to copy.
3. Select the 'Copy To' button and click the storage you wish to copy the project to. Select the same storage location if you want the copy in the same location as the original.


Open Job
Local
Test Storage
New FolderStorage
Locations
Delete
Properties
Move To
Copy To
Columns
Close
Local
Test Storage
New FolderStorage
Search:
Icon
Name
Description
Bid Due Date
Primary Estimator
Status
Last Modified
49695-1 7/27/2011 3:55:01 PM
octaform 7/25/2011 11:14:24 A
Sample Plans Demo Demonstration Plans 1/25/2011 Joe Parsons Waiting for Info 7/20/2011 1:09:02 PM
sample 77 6/21/2011 4:00:04 PM
Miriam PDF 5/17/2011 7:17:11 PM
Sample Job B Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
test xls 4/21/2011 2:34:19 PM
Octaform Demo 4/15/2011 5:16:24 PM
Sample Plans xyz Test Job 1/25/2011 Mike Ramsey Won 3/18/2011 4:32:17 PM
SB144 ATK ACCE 3/18/2011 11:26:46 A
DWF Test DWF Import Test Autocad 2010 Passed Never Mike Ramsey In Review 3/17/2011 9:44:16 AM
Cad File Import Test Testing File for customer Never Mike Ramsey Won 3/17/2011 9:20:17 AM
SCC Addn 11_04 Sandhill Comm Co Addn 3/17/2011 9:19:03 AM
rvarva 3/16/2011 9:34:31 AM
ACS Demo 12/08/2010 2/15/2011 Bob Smith Assigned 3/10/2011 7:00:46 PM
J 046 EIDA 3/10/2011 6:50:09 PM
3 Beiker Main Floor
84L 2010-002 Murray Hill
10000
112310b HB SWOFFORD Career Ctr Phase II
Show Me How
Open Job
Cancel

4. Once the job has processed the copy simply select the copy and press the Properties button on the tool bar.


Open Job
Local
Test Storage
New FolderStorage
Locations
Delete
Properties
Move To
Copy To
Columns
Close
Properties
Search:
Icon
Name
Description
Bid Due Date
Primary Estimator
Status
Last Modified
49695-1 7/27/2011 3:55:01 PM
octaform 7/25/2011 11:14:24 A
Sample Plans Demo Demonstration Plans 1/25/2011 Joe Parsons Waiting for Info 7/20/2011 1:09:02 PM
sample 77 6/21/2011 4:00:04 PM
Miriam PDF 5/17/2011 7:17:11 PM
Sample Job B Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
Sample Job B - Copy Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
test xls 4/21/2011 2:34:19 PM
Octaform Demo 4/15/2011 5:16:24 PM
Sample Plans xyz Test Job 1/25/2011 Mike Ramsey Won 3/18/2011 4:32:17 PM
SB144 ATK ACCE 3/18/2011 11:26:46 A
DWF Test DWF Import Test Autocad 2010 Passed Never Mike Ramsey In Review 3/17/2011 9:44:16 AM
Cad File Import Test Testing File for customer Never Mike Ramsey Won 3/17/2011 9:20:17 AM
SCC Addn 11_04 Sandhill Comm Co Addn 3/17/2011 9:19:03 AM
rvarva 3/16/2011 9:34:31 AM
ACS Demo 12/08/2010 2/15/2011 Bob Smith Assigned 3/10/2011 7:00:46 PM
J 046 EIDA 3/10/2011 6:50:09 PM
3 Beiker Main Floor
84L 2010-002 Murray Hill
10000
Show Me How
Open Job
Cancel

5. The Job Properties window will open. Now you can edit the job properties by clicking the advanced button on the window and change the job name if you like.

Posted Mike Ramsey - Aug 1, 2011 at 2:34 PM. This article has been viewed 1714 times.

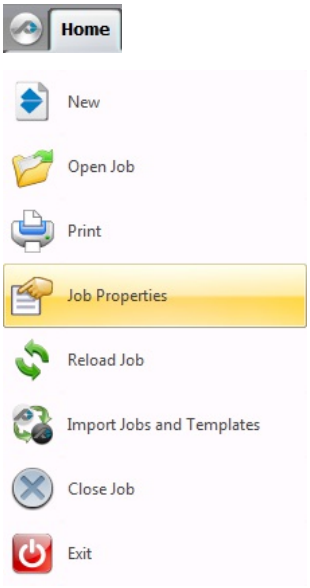
Online URL: http://www.planswift.com/phpkb/article.php?id=1815

How to Rename a Job

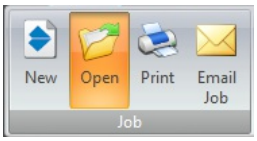
Article Number: 1816 | Rating: 1/5 from 1 votes | Last Updated: Aug 2, 2011 at 9:53 AM

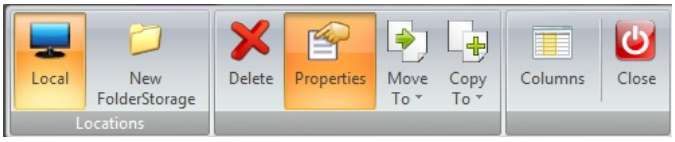
To rename a job in PlanSwift, you need to locate the job properties window. This window is accessible by two possible ways. The first way to open this window is to click on the PlanSwift Icon in the upper right corner of the screen. This will open a drop menu where you

will see the option 'Job Properties'.

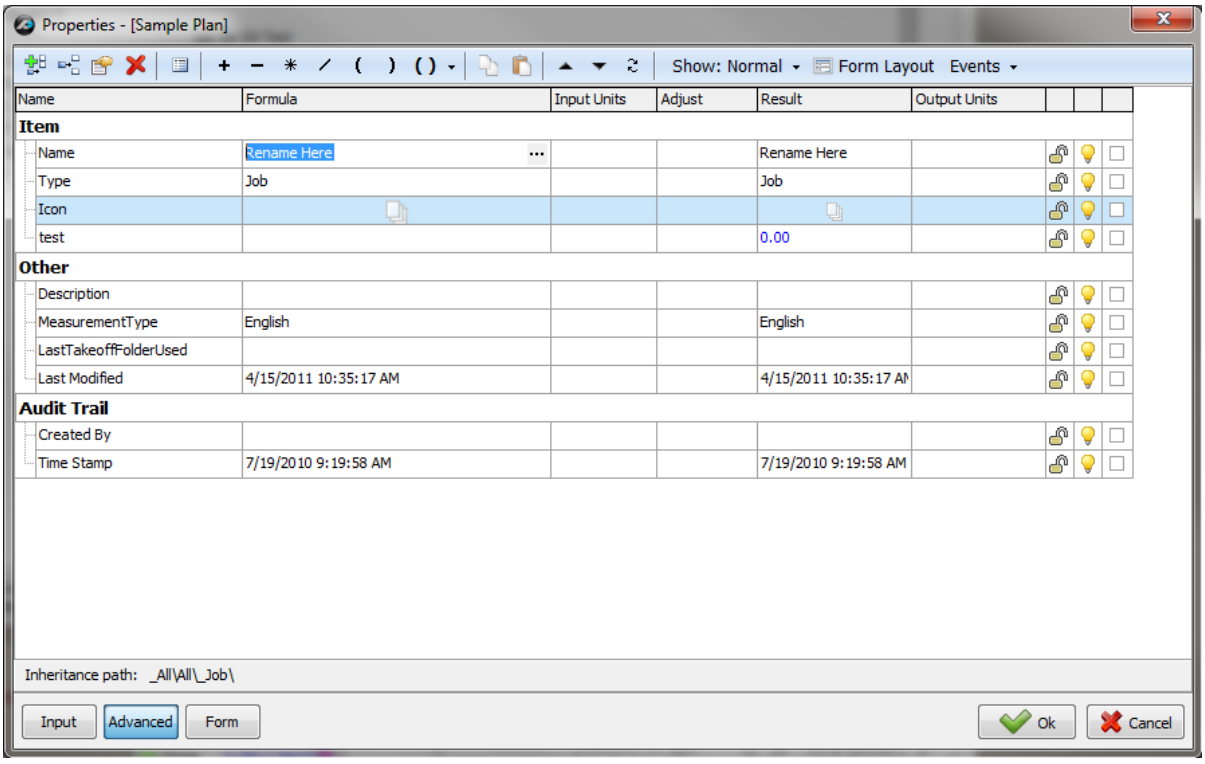


Another way to access the 'Job Properties' window is by clicking the Open Job button located in the Home tab. Again, in the Open Job window, you will see the option 'Job Properties'.





Once you open the 'Job Properties' window, edit the name of the job in the Advanced View.



Once finished, simply click 'Ok'.

Posted Mike Ramsey - Aug 1, 2011 at 2:36 PM. This article has been viewed 1367 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1816

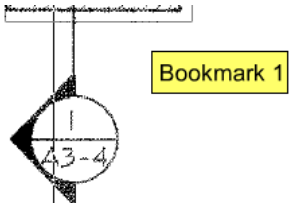
How To Add a Bookmark Link

Article Number: 1821 | Rating: Unrated | Last Updated: Mar 14, 2012 at 3:41 PM

To add a Bookmark Link, start by finding the desired bookmark in the bookmark list.

Once you have found the bookmark you want, left click on the bookmark and drag it to a desired location on the job page.

When the bookmark is dragged onto a page, once let go, a note will be left with that bookmarks name.



Now if you drag the mouse over the bookmark link, it will be highlighted in a blue box. If clicked, the bookmark link will open that specific bookmark that you had previously created.

To watch the video about this topic, click here.

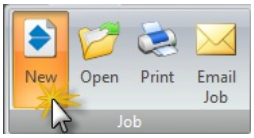
Posted Mike Ramsey - Aug 3, 2011 at 2:07 PM. This article has been viewed 1311 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1821

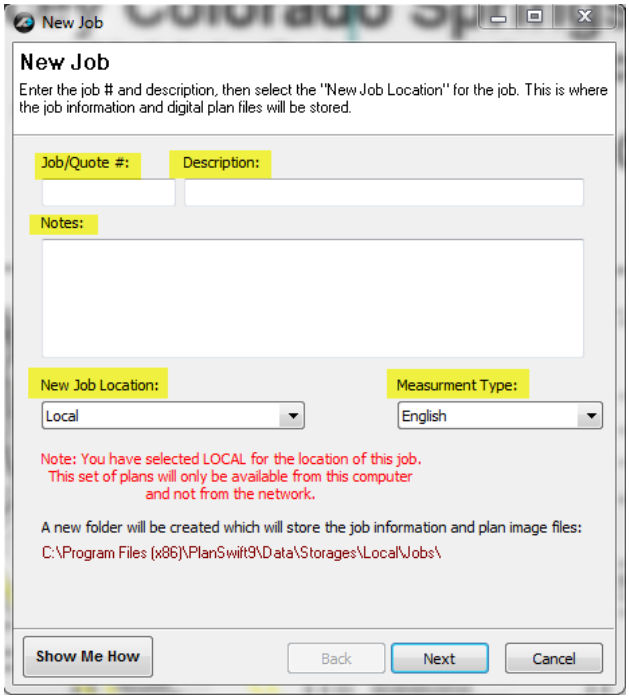
How To Start a New Project

Article Number: 1818 | Rating: Unrated | Last Updated: Aug 5, 2011 at 2:38 PM

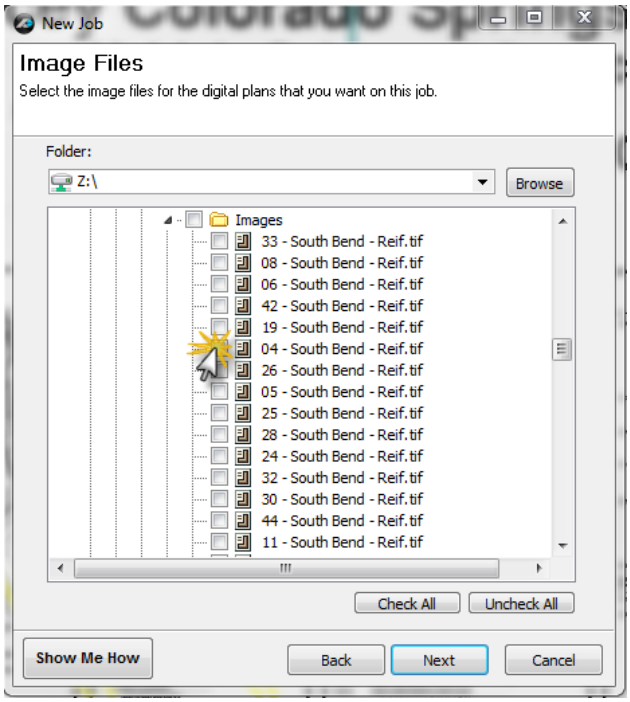
To create a New Project , star by clicking the 'New Job' icon in the 'Home' tab.



In the 'New Job' dialog, you can edit the Job number, description of the job, any notes about the job, the location where the job will be saved, and the measurement type (English or Metric).

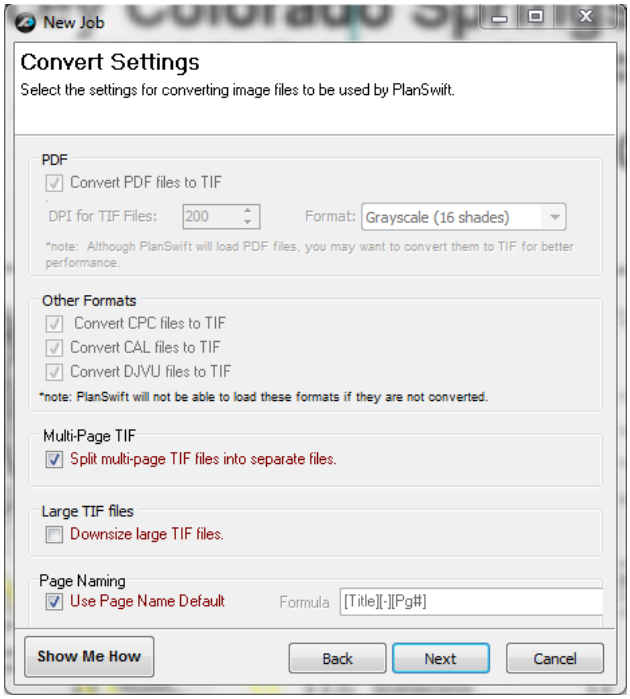

New Job
New Job
Enter the job # and description, then select the "New Job Location" for the job. This is where the job information and digital plan files will be stored.
Job/Quote #:
Description:
Notes:
New Job Location:
Local
Measurment Type:
English
Note: You have selected LOCAL for the location of this job.
This set of plans will only be available from this computer
and not from the network.
A new folder will be created which will store the job information and plan image files:
C:\Program Files (x86)\PlanSwift9\Data\Storages\Local\Jobs\
Show Me How
Back
Next
Cancel

Click 'Next' once you are finished. Now you will select the image files you want for the job.


New Job
Image Files
Select the image files for the digital plans that you want on this job.
Folder:
Z:\
Browse
Images
33 - South Bend - Reif.tif
08 - South Bend - Reif.tif
06 - South Bend - Reif.tif
42 - South Bend - Reif.tif
19 - South Bend - Reif.tif
04 - South Bend - Reif.tif
26 - South Bend - Reif.tif
05 - South Bend - Reif.tif
25 - South Bend - Reif.tif
28 - South Bend - Reif.tif
24 - South Bend - Reif.tif
32 - South Bend - Reif.tif
30 - South Bend - Reif.tif
44 - South Bend - Reif.tif
11 - South Bend - Reif.tif
Check All
Uncheck All
Show Me How
Back
Next
Cancel

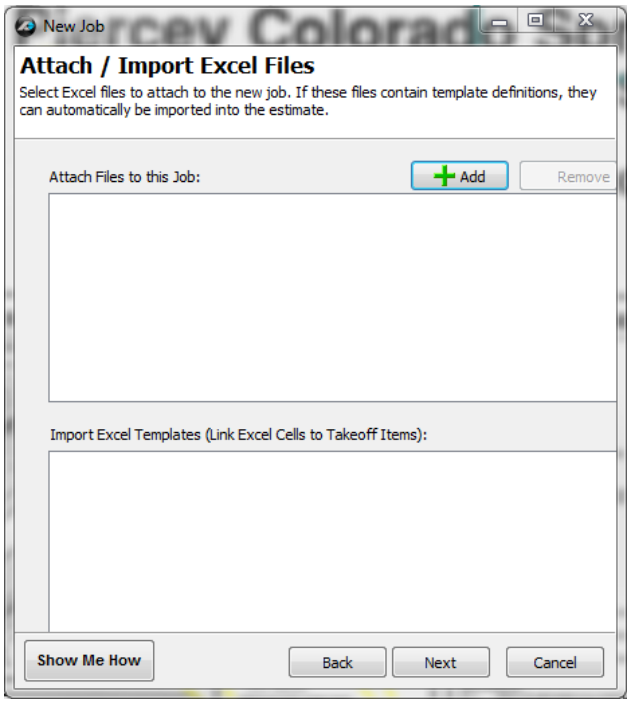
Once you locate the image files, select which ones you would like by clicking in the empty check boxes, then click "Next'.

The next window will give you options for converting PDF files and other formats. Also, for an organizational purpose for jobs with more than one page, you have the option of separating TIF files into individual files. This can be helpful if you are looking to delete just one page. If your computer runs a little slow, you may want to downsize the TIF files so your computer will run smoother and more quickly. And finally, you have the option for Page Naming which allows you to impend text to the page name.

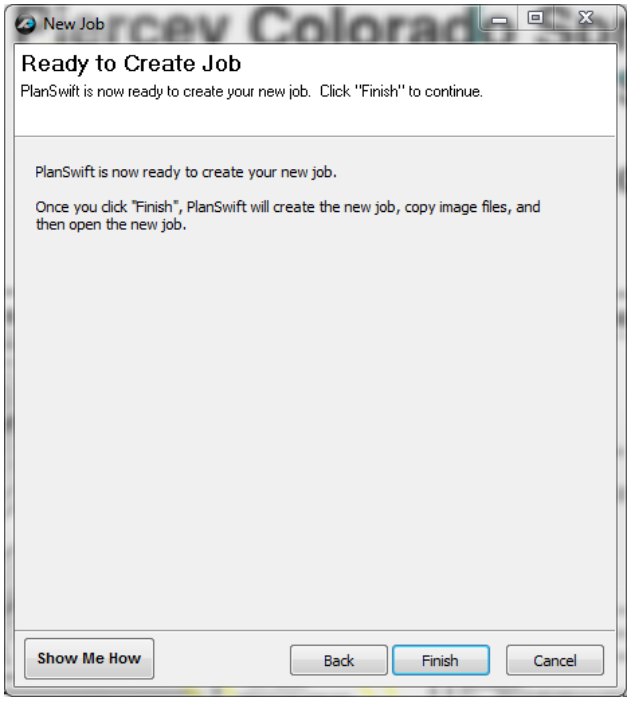

New Job
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Grayscale (16 shades)
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into separate files.
Large TIF files
Downsize large TIF files.
Page Naming
Use Page Name Default
Formula
[Title][-][Pg#]
Show Me How
Back
Next
Cancel

(The files used in this example were already TIF files, therefore no options for conversions are available.)

The next window allows you to import Excel files and attach other files to the job. For detailed information about this option, watch the video here.


New Job
Attach / Import Excel Files
Select Excel files to attach to the new job. If these files contain template definitions, they can automatically be imported into the estimate.
Attach Files to this Job:
Add
Remove
Import Excel Templates (Link Excel Cells to Takeoff Items):
Show Me How
Back
Next
Cancel

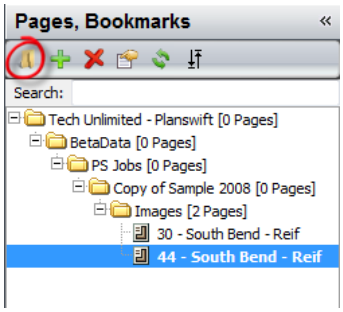
Click 'Next' to continue.

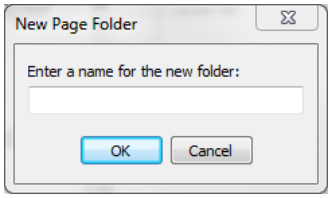

New Job
Ready to Create Job
PlanSwift is now ready to create your new job. Click "Finish" to continue.
PlanSwift is now ready to create your new job.
Once you click "Finish", PlanSwift will create the new job, copy image files, and then open the new job.
Show Me How
Back
Finish
Cancel

Now click 'Finish' to load the new job.

Now that all of your pages have loaded for your new job, you may want to organize them into multiple folders. To do this, start by creating a new folder in the Pages window on the left side of your screen.

Click on the 'New Folder' button to create a folder with the name of your choosing. Then simply drag and drop the desired pages into that folder.


Pages, Bookmarks
Search:
Tech Unlimited - Planswift [0 Pages]
BetaData [0 Pages]
PS Jobs [0 Pages]
Copy of Sample 2008 [0 Pages]
Images [2 Pages]
30 - South Bend - Reif
44 - South Bend - Reif



To watch a video about starting a new project, click here.

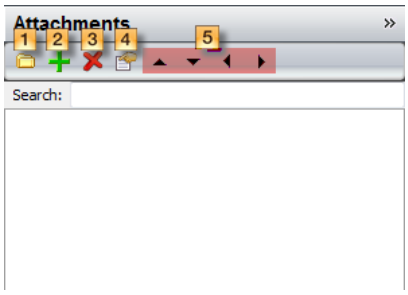
Posted Mike Ramsey - Aug 2, 2011 at 11:41 AM. This article has been viewed 1259 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1818

How To Add Attachments to a Project

Article Number: 1824 | Rating: Unrated | Last Updated: Aug 9, 2011 at 10:02 AM

To add attachments to your project, start by opening the attachments sidebar window in PlanSwift.



1. Allows you to create a New Folder for organizing attachments.

2. Allows you to add attachments by opening Windows Explorer. Simply select the desired files in Windows Explorer, and click 'Open'.

3. Allows you to delete any files or folders in the Attachments sidebar.

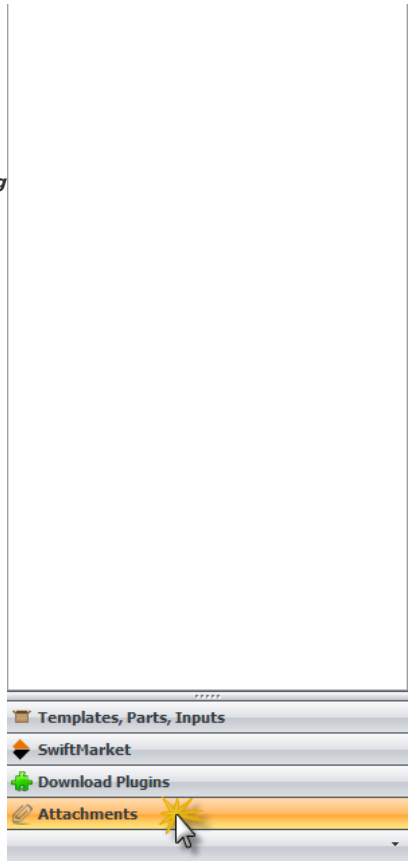
4. Allows you to view and edit basic and advanced properties regarding the selected attachment. For more information about advanced properties, click here to watch the video.

5. Directional arrows allow you to organize the attachments by moving them up, down, left or right. ** ***Moving files left or right is only useful when placing or removing files from folders.***

There is also the option of adding desired attachments to the Attachment sidebar window simply via drag and drop.

If you have multiple attachments for one job, you have the option of searching for a specific attachment or file via the 'Search' bar located at the top of the Attachment sidebar window.

To watch the video about this topic, click here.



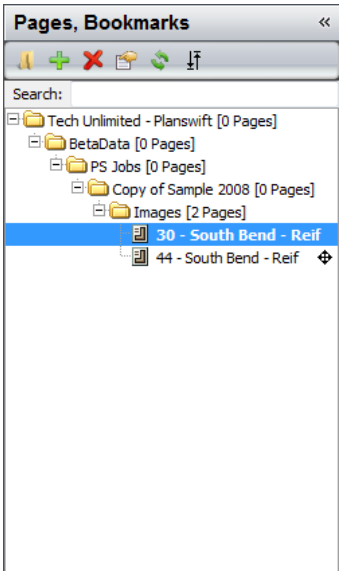
Posted Mike Ramsey - Aug 4, 2011 at 1:12 PM. This article has been viewed 983 times.

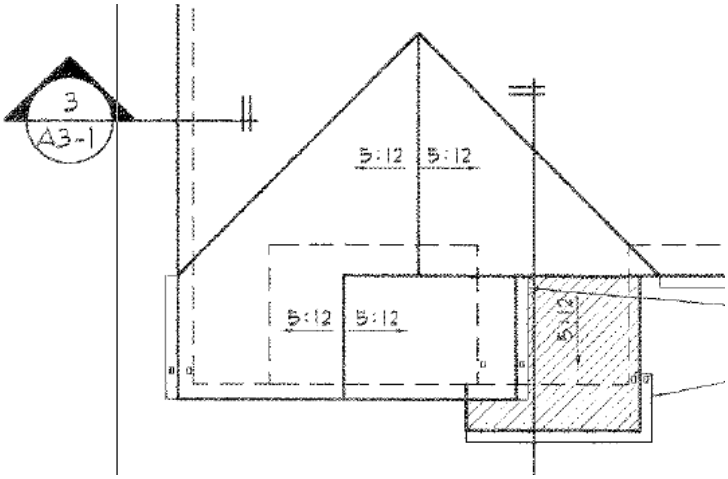
Online URL: http://www.planswift.com/phpkb/article.php?id=1824

Adding a Bookmark

Article Number: 1820 | Rating: Unrated | Last Updated: Aug 8, 2011 at 2:05 PM

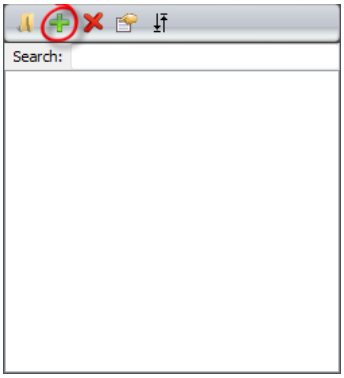
To add a bookmark, first select the page you would like to bookmark from, then select the level that you would like to create the bookmark at.

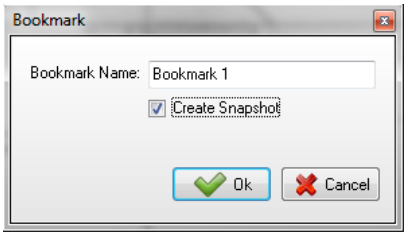

Pages, Bookmarks
Search:
Tech Unlimited - Planswift [0 Pages]
BetaData [0 Pages]
PS Jobs [0 Pages]
Copy of Sample 2008 [0 Pages]
Images [2 Pages]
30 - South Bend - Reif
44 - South Bend - Reif



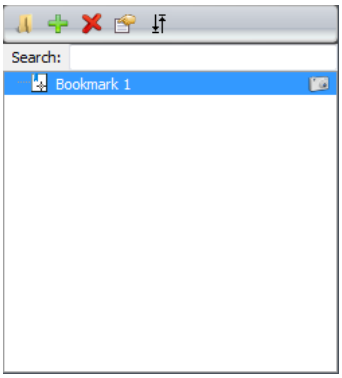
***** The level refers to the view of the image in terms of the % zoom. This example view is at approximately 70% zoom.***

Next, click the green 'plus' symbol in the Bookmark window.





Enter a name for the Bookmark, check the box for 'Create Snapshot' if you want to capture a small image of the bookmarked area, then click 'Ok'. To view the snapshot of the bookmark, click in the camera icon to the right of the bookmark name.



Now there is a created bookmark in the Bookmark window. Anytime a page is open, clicking the desired bookmark in the list will automatically change the page to view that specific bookmark.

To watch the video on this topic, click here.

Posted Mike Ramsey - Aug 3, 2011 at 11:00 AM. This article has been viewed 967 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1820

Importing Plans

Import a Job from a PlanSwift E-Mail

Article Number: 1779 | Rating: 4/5 from 2 votes | Last Updated: Mar 29, 2013 at 2:30 PM

1. Open the PlanSwift email in your default email client (Outlook, Yahoo, Gmail, etc...)
   The email should look something like below
   > A PlanSwiftâ„¢ user has sent you some files.
   >
   > Click the following link to download:
   > http://share.planswift.com/download/?file=J86E1SS3-7AN8-HD4S-C06A-4LIVW6VBBW5
   > This file will be available for download for 30 days from today (expiring 04/08/11).
   >
   > PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift.
   > Available for download at http://www.planswift.com/requesttrial
2. Click the First link in the email
3. A dialog box will appear asking you to save the file. Save the file to your desktop or location of your choice
4. Open PlanSwift if it is not already open. (If you do not have a copy of PlanSwift click here)
5. Click on the Tab named "Other" and click the Unzip SwiftJob button.
6. The Open dialog will appear. Select the file you saved in step 3 and press Open
7. The Import dialog will appear. Select your storage location (The default location is your local computer)
8. Name The Job (IMPORTANT: Rename the job to avoid duplicates)
9. Press Ok

This will now start the import process. Congradulations you have just imported your first job.

Posted Mike Ramsey - Mar 22, 2011 at 3:45 PM. This article has been viewed 3094 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1779

Help

There are no articles under this category.

Converting Plans

There are no articles under this category.

License Management

There are no articles under this category.

Printing & Reporting

How to Print and Save to PDF

Article Number: 2265 | Rating: 3.5/5 from 2 votes | Last Updated: Apr 24, 2013 at 2:14 PM

There are various areas that you can print information from PlanSwift to your local or network printer but sometimes you want an electronic document file that you can email or archive for safekeeping. This article will show you how to accomplish this task. Watch the Video

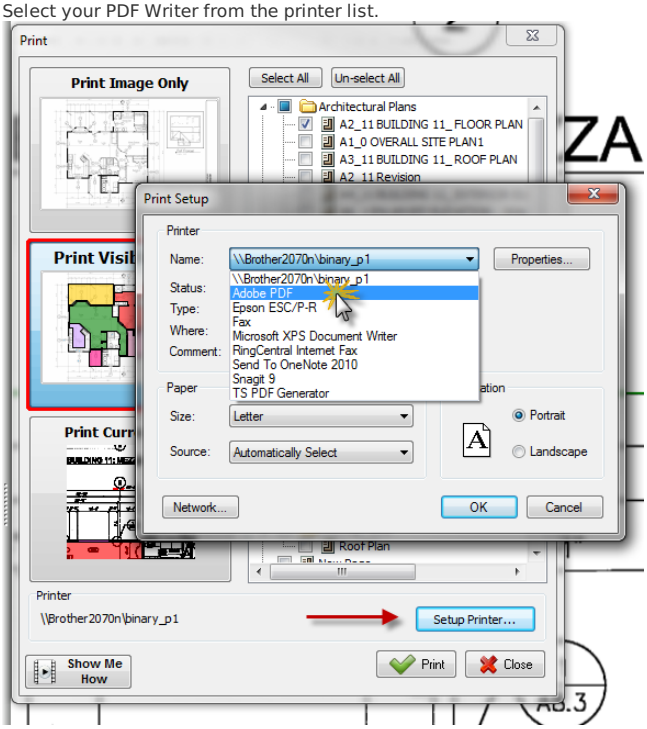
The first requirement you will need is a PDF creator. For this tutorial I am using Adobe Acrobat X Pro but there are also many free PDF creation software applications available on the internet. Here are a few:

- Adobe Acrobat Standard - http://www.adobe.com/products/acrobat.html
  Rock solid but costs about $139.00
- Foxit PDF Creator - http://www.foxitsoftware.com/products/creator/
  Another solid performer at $17.00
- Cute PDF Writer - http://www.cutepdf.com/
  $$ FREE $$ Selected as One of the "50 Best free downloads" by Computer Shopper
- BullZip - http://www.bullzip.com/products/pdf/info.php
  $$ FREE $$ Many options, very stable, very complete set of options
- *PDF 24 Creator - http://en.pdf24.org/pdf-creator-download.html*
  $$ FREE $$ Supports document merge, allows scanner input, drop and drag interface, digital signing, selectable quality settings.
- *Others can be found here*

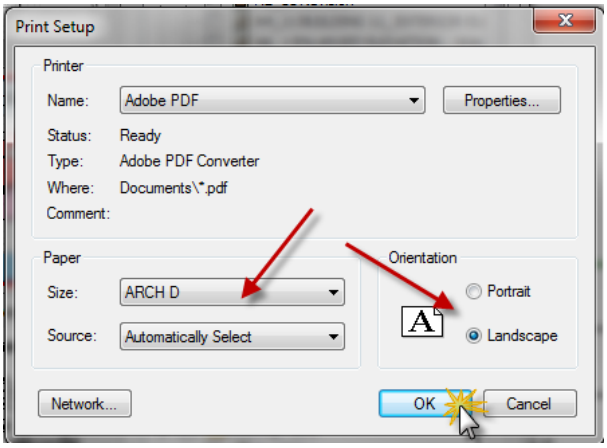
While FREE is always good there are no guarantees that they will work in all cases with all image type. If you already have a PDF writer installed then you are one step ahead of the game.

Printing Pages to PDF

1. First click 'Print' from the home tab.
2. Click on the 'Setup Printer' button in the lower right of the dialog window.
3. Select your PDF Writer from the printer list.



4. Next select the appropriate paper size and orientation for the file you are going to create and click OK.
   Note: *Clicking Properties will open the PDF application properties which will be different in each software*



5. Now that the printer is set up and you have made your selections in the print dialog click 'Print'.
6. The PDF application should prompt you with a Save dialog to name and save your files.
   Note:*Again this dialog may vary depending on the PDF application.*

These same steps can be repeated in other areas of the software that call their respective print functions. Simply specify the PDF printer as your printer.

Posted Mike Ramsey - Jul 13, 2012 at 4:58 PM. This article has been viewed 18867 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2265

Overlays

There are no articles under this category.

Notes & Highlighter

There are no articles under this category.

Parts & Assemblies

PlanSwift Formula Operators

Article Number: 1794 | Rating: Unrated | Last Updated: Jul 13, 2011 at 5:25 PM

This article will cover what all of the PlanSwift formula operators are and what they can be used for.

Requirements:
PlanSwift version 9.0
Difficulty - Easy

Start tutorial here

Operator	Description	Example
[..]	Get result from parent object of the same property name if it exists	
[..\example]	Dot dot backslash gets a result from a parent object. each consecutive set will go up the hierarchical tree by one level.	[..\name]
[!SUM()]		
RoundUp()		

Add Video Here

Posted Mike Ramsey - Jul 13, 2011 at 5:25 PM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1794

Dynamic parts using expressions: Turorial #1

Article Number: 1797 | Rating: Unrated | Last Updated: Jul 15, 2011 at 10:46 AM

in progress

Posted Mike Ramsey - Jul 15, 2011 at 10:45 AM. This article has been viewed 0 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1797

Create advanced parts using expressions

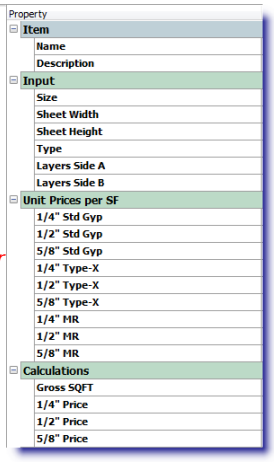
Article Number: 285 | Rating: Unrated | Last Updated: Mar 29, 2013 at 2:39 PM

In this article we will cover how to create advanced parts using expressions.

An expression in a programming language is a combination of values, variables, operators, and functions that are interpreted (*evaluated*) according to the particular rules of precedence and of association for a particular programming language, which computes and then produces (*returns*, in a stateful environment) another value. The expression is said to *evaluate to* that value. As in mathematics, the expression *is* (or can be said to *have*) its evaluated value; the expression is a representation of that value.

In this example we will be creating a part that will determine the cost of an item based on a set of variable information.

Requirements:
Version 8.5
Dificulty - Moderate



This part will be a drywall item where you can select the sheet size, sheet thickness, and type of drywall. Based of the selections you make you can determine a unit price to apply to the sheet count that is gene

rated. This will allow you to create one complex part rather than several individual parts.

1. Click on the "New Part" button located at the top of the estimating window to add a new item.
2. Give the part a name. In this example we will use "Drywall Template".

Tip: At this point is is good practice to think about all of the variables you will need for your part. Map it out with paper and pencil first, this will help you to think it through before you start writing the necessary code.

3. In my example I have determined that I need to create the following properties (shown in blue):

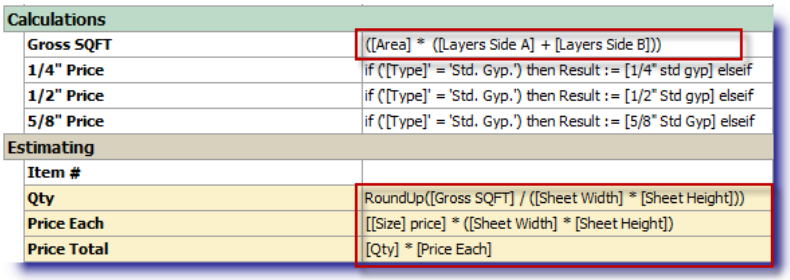
   Sheet Width and **Sheet Height** (to specify the sheet size I want. Check the box to set it as an input)
   Layers for Side A and **Layers for Side B** (this will allow me flexibility to specify different layers for each side i.e. Side A specifies - 1 layer and side B - 2 layers. Check the box to set it as an input)
   Sheet Thickness (1/4", 1/2" 5/8" etc set the type to Text and check the box for input.)

Type (Std. Gyp, Type-X, Moisture Resistant etc. set the type to Text and check the box for input.)
SqFt Calc (for calculating the gross Sq Ft of board)
1/4" Std Gyp, 1/2" Std Gyp, 5/8" Std Gyp, 1/4" Type-x, 1/2" Type-x, 5/8" Type-x, 1/4" MR, 1/2" MR, and 5/8"MR (for entering the price per square foot)
1/4" Price, 1/2" Price and **5/8" Price** (this is where we will write the expressions after entering the name change the type to Expression (Pascal))

We will also take advantage of the List feature as we create the new properties. For sheet Thickness create a list of 1/4", 1/2", 5/8" and check the box to only select from this list. For Type create a list of Std. Gyp, Type-X, Moisture Resistant and check the box to only select from this list. You can change the names or add more to suit your own needs just remember to add them in the expressions as well.

Tip: When creating new properties I like to utilize the Group feature. You will notice I have created a group for the properties that I have set to be input items. This will not affect the claculations in any way but just keeps things organized.

4. Start with the basic calculations first.


Calculations
Gross SQFT
([Area] * ([Layers Side A] + [Layers Side B]))
1/4" Price
if ('[Type]' = 'Std. Gyp.') then Result := [1/4" std gyp] elseif
1/2" Price
if ('[Type]' = 'Std. Gyp.') then Result := [1/2" Std gyp] elseif
5/8" Price
if ('[Type]' = 'Std. Gyp.') then Result := [5/8" Std Gyp] elseif
Estimating
Item #
Qty
RoundUp([Gross SQFT] / ([Sheet Width] * [Sheet Height]))
Price Each
[[Size] price] * ([Sheet Width] * [Sheet Height])
Price Total
[Qty] * [Price Each]

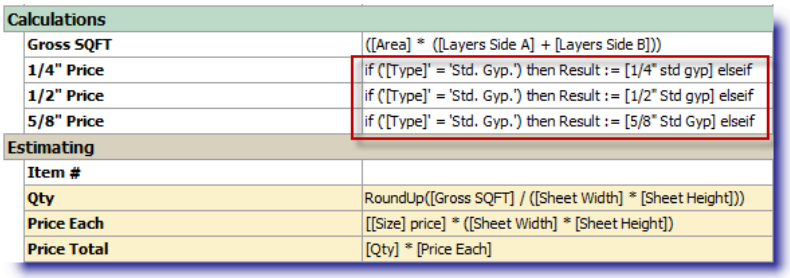
Let's do the Gross Square footage first You can see we have used **([Area]* ([Layers Side A] + [Layers Side B]))**. This is giving you the correct square footage to start the calculation.

Now we can build the QTY calculation - **RoundUp([Gross SqFT] / ([Sheet Width * Sheet Height))** This will take the gross square footage we just calculated above and divide the footage by the square footage of the sheet size. This will give us the sheet count required and round to the nearest full sheet.

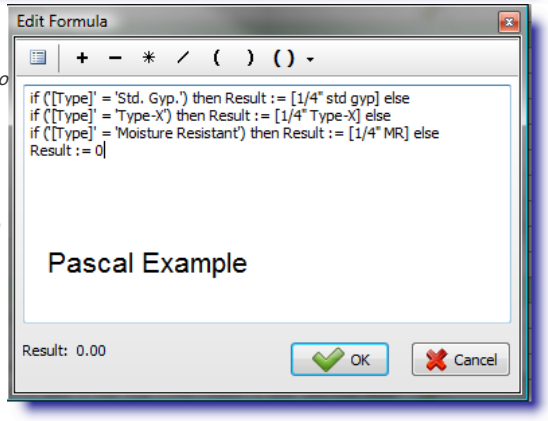
The Price Each calculation is where we will use the nested property - **[[Size] price]** this takes the value fron the property *"Size" and appends* it to the text " price" thus creating the property of ,for example, ***"1/4" Price***" **Note:** Be mindful of any spaces you create in property names as these are recognized as characters. In this example there is a space before "price".
After **[[Size] price],** which is going to be the price per square foot, add ***([Sheet Width]*[Sheet Height])**. This will now calculate the price per square foot and multiply by the square footage of the sheet size giving the price per sheet.

The Price Total is simply left as the QTY multiplied by the Price of each sheet.

5. Now for the Expressions...

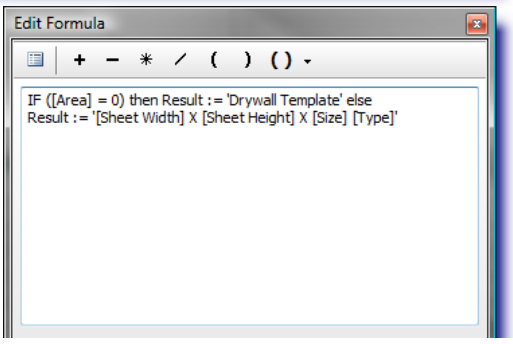

Calculations
Gross SQFT
([Area] * ([Layers Side A] + [Layers Side B]))
1/4" Price
if ('[Type]' = 'Std. Gyp.') then Result := [1/4" std gyp] elseif
1/2" Price
if ('[Type]' = 'Std. Gyp.') then Result := [1/2" Std gyp] elseif
5/8" Price
if ('[Type]' = 'Std. Gyp.') then Result := [5/8" Std Gyp] elseif
Estimating
Item #
Qty
RoundUp([Gross SQFT] / ([Sheet Width] * [Sheet Height]))
Price Each
[[Size] price] * ([Sheet Width] * [Sheet Height])
Price Total
[Qty] * [Price Each]

Open the Edit Formula window by clickinig on the elipses button [...] in the value field. This will open the Edit Formula window. This window allows a greater view of the formula you are creating. This is the area where everything is case sensative.
Let's start with the IF statement - **If('[Type]' = 'Std. Gyp.') then Result := [1/4" std gyp] else**
*This is saying if the 'Type' property is exactly equal to the value 'Std. Gyp.' then use the result that is in the '1/4" std gyp' property and if it is not then read the next line. This repeats until the code reads **Else Result := 0** thus if none of the criteria match use 0.*


Edit Formula
if ('[Type]' = 'Std. Gyp.') then Result := [1/4" std gyp] else
if ('[Type]' = 'Type-X') then Result := [1/4" Type-X] else
if ('[Type]' = 'Moisture Resistant') then Result := [1/4" MR] else
Result := 0
Pascal Example
Result: 0.00
OK
Cancel

6. You can copy this formula and paste it into the other properties for the other sizes just edit the **[1/4"...]** to match the appropriate size.
7. We're almost ready to try our new part! Now just populate the price per square foot for all of the different types you have created.

8. Here is one more expression you can use if you like. This one can be set up in the **Name** property. Double click on the Name property and once again set the 'Type' to *Expression (Pascal)*.



IF ([Area] = 0) then Result := 'Drywall Template' else Result := '[Sheet Width] X [Sheet Height] X [Size] [Type]'
This states that when the [Area] is equal to 0 use 'Drywall Template' for the Name; if not use the sheet height, width, size and type based on the selections chosen from the inputs.

With all of the calculations completed your part is ready for

use. Try it on a practice area by draging it from the SwiftDepot window on to your digitizer. It should open the 'Input' window and you should be able to select from your drop down menu; the size and the type of drywall, the sheet height and width, and the number of layers on each side of the wall. If it is a ceiling just use one of the sides.

It is always a good practice to try all of the different combinations from your newly created part to check for any errors and correct them. With the addition of the expressions this type of dynamic part can be created for any number of building components. Drywall, concrete, metal and wood studs, pricing, names, grades, guages, the possibilities are almost limitless!

PlanSwift version 8.5 and later

Posted Mike Ramsey - Nov 26, 2008 at 6:44 PM. This article has been viewed 10202 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=285

Formula Examples

Article Number: 2273 | Rating: 4.7/5 from 3 votes | Last Updated: Mar 29, 2013 at 2:26 PM

Intro

This will give you some examples of formulas that can be used.

Steps

Have a "Job" open

Go into "Advanced Properties" on a item you want the formula on.

[!Date]	Will create the current date when the item was created.
[!Time]	Will create the current time when the item was created.

[\Job\Name]	Will give you the Job's Name
[..\PropertyName]	Will get the parent items property name. Example: [..\Qty] will give you the parent item's [Qty] property.
[..\..\Name]	Will give you the [Name] property of the parent of the parent item.
[..]	Will get the parent's property with the same property name. [..\..] Works as well if you need the grandparent's same property name.
[..\!Units('Takeoff')]	Gives you the parent items Takeoff property Units. So you can specify the parent item !Units of ('PropertyName') Example [..\!Units('Takeoff')] will give you SQ FT if the parent item is a Area. If the parent item is a Linear then the result would be FT. For Labels must be [..\..\!Units('Takeoff')] . They are childrens of sections, which do not have Units('Takeoff') specified.
[!FolderLocation]	Gives you the path to the folder the item is located in.
[!ExePath]	Gives you the path of the planswift.exe file.
[\Settings\User]	Gives you the Planswift User Name
[!Sum(PropertyName)]	Gives you a sum of all sub item or children items under that parent item like [!sum(Price Total)] will give you the sum of all sub items under that item. Good for Assemblies to have sum of that property in () on all sub parts.
[!RandomColor]	Will pick a random color each time you create a new item.
Pi	Returns a value of 3.1415926535897932385 Example: Pi*Sqr([Diameter]/2) This example could be used to find the area of a circle.
Hypot(Number1, Number2)	Will return the Hypotenuse of a right angle.
Sqr(Number) or X^2	Returns a number squared. This numeric value to be squared. Example: Sqr(2) will return 4 Sqr(4) will return 16 Sqr(5) will return 25
Sqrt(Number)	Returns the square root of a number. This is a numeric value to find square root value of. Example: Sqrt(25) will return 5 Sqrt(64) will return 8 Sqrt(144) will return 12
Exp(Number)	Returns e (the base of natural logarithms) raised to a power. This is a numeric value to be raised to e. Example: Exp(1) will return 2.72 Exp(2) will return 7.39 Exp(3) will return 20.09
Round(Expression)	Returns a number of the value rounded to the nearest whole number. If X is exactly halfway between two whole numbers (X.5), the result is always the even number. This method of rounding is often called "Bankers Rounding".

Round(Expression)	(Expression) This is a value to be rounded. Example: 0.5 will round to 0 0.75 will round to 1 1.5 will round to 2
Round(([Property]*2) +0.5)/2	Will round to the nearest half. Example: Round(([Takeoff]*2) +0.5)/2 If [Takeoff] was 1.3 result would be 1.5
Ceil(Expression)	Returns a number of the value rounded up to the nearest whole number. This method of rounding is called "Round Up" (Expression) This is a value to round up to the nearest whole number. Example: Ceil(1.3) will round to 2 Ceil(1.5) will round to 2 Ceil(2.1) will round to 3
Floor(Expression)	Returns a number of the value rounded down to the nearest whole number. This method of rounding is called "Round Down" (Expression) This is a value to round down to the nearest whole number. Example: Ceil(1.3) will round to 1 Ceil(1.5) will round to 1 Ceil(2.1) will round to 2
Min(Expression1, Expression2)	Returns the lesser of two numeric values. Expression1 This is a value to be used in the evaluation of finding which value is smaller. Expression2 This is a value to be used in the evaluation of finding which value is smaller. Example: Min(2, 4) will return 2 Min(10, 5) will return 5
If ('[Stud Length]' = '8') then result := '8 foot stud 26PC' Else If ('[Stud Lenght]' = '10') then result := '10 foot stud 2610' Else Result := 0	Returns a value based off what another property is set to. Then at the end If no value is set in [Stud Length] it will result in a 0
If ('[PropertyName]'<= '8') then result := 8 Else If ('[PropertyName]'>= '10') then result := 10 Else Result := 0	Is a "If Expression" using < Greater or less then > signs. Example: if # is 9 if expression will return 10 if # is 6 if expression will return 8
[Property1Name[Property2Name]]	Nested formula. see the How To - Create A Nested Formulas <--- click to go to the page
Expressions	http://www.planswift.com/kb/entry/285/ <--- Link to Expression

Posted Mike Ramsey - Mar 29, 2013 at 2:26 PM. This article has been viewed 2332 times.

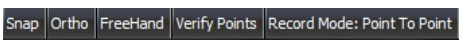
Online URL: http://www.planswift.com/phpkb/article.php?id=2273

Digital Takeoff

Digital Takeoff Tool Options

Article Number: 1814 | Rating: Unrated | Last Updated: Aug 12, 2011 at 9:35 AM

The Digital Takeoff recording options are located at the bottom of your screen.



There are five different tool options. Snap, Ortho, Freehand, Verify Points, and a Record Mode. These options can be turned on or off by simply clicking on their location.

Snapping allows an object to easily be positioned in alignment with another object by causing it to automatically jump to an exact position when you drag it into the proximity of a desired location. For example, if creating a New Linear, you can snap your lines to an existing point by putting your cursor near that point.

Ortho means straight. This will keep you locked in the horizontal, vertical, and forty-five degree axis. You can temporarily override this option by holding the Shift key to allow you to move to any angle you would like.

Freehand allows the takeoff of a free form object. By holding the left click on the mouse, the lines will follow the cursor movement.

The **Verify Points** option allows you to modify the exact length of the segment you are taking off, on the fly. When you click each point after setting this tool, you will be prompted with a dialog box in which you can adjust the dimension.

Record Mode has two options, **Point to Point**, and **Box**. Toggle between these options by clicking the on the **Record Mode** text. *Note: This is only visible when you have a digitizer tool active.*

- **Point to Point** sets a point each time you click your mouse while actively recording in a takeoff tool.
- **Box** is a two click drawing mode which allows you to create rectangle or square areas by clicking two opposite corners such as upper left and lower right.

To watch a video about the Digital Takeoff Tool Options, click here.

Posted Mike Ramsey - Aug 1, 2011 at 11:30 AM. This article has been viewed 5619 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1814

Digitize Area, linear and segments.

Article Number: 2259 | Rating: Unrated | Last Updated: May 29, 2012 at 6:11 PM

in 9.3 and above there are a couple of additions to the area, linear and segment digitizing tools.

- Double clicking the second, third, forth, etc. point in an area or linear ends the current linear and remains in the digitizer record mode. In the case of areas, closes the current area and remains in the digitizer record mode. This allows you to continue digitizing with minimal clicks and movement.
- Dragging (click and hold the mouse button down and drag) to the next point ends the current linear / segment and remains in the digitizer record mode (a segment will end at this point and allow you to continue with the next segment, a linear will remain in the digitizer record mode and allow you to continue digitizing the next new linear).

Posted Steven Keyser - May 29, 2012 at 2:11 PM. This article has been viewed 3369 times.

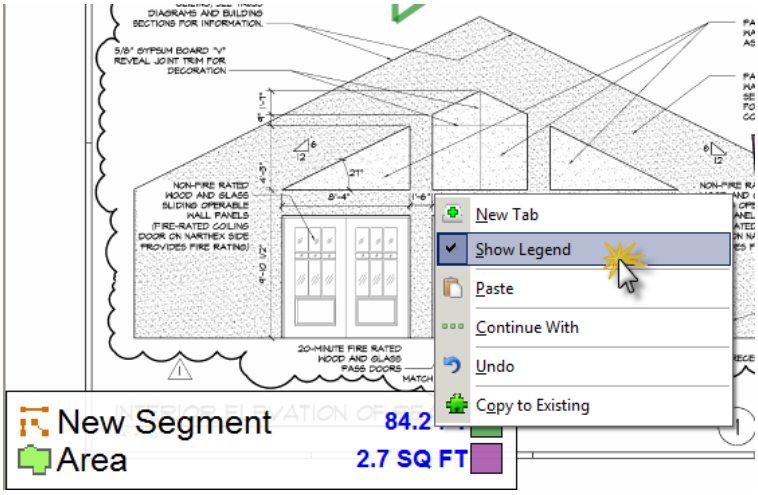
Online URL: http://www.planswift.com/phpkb/article.php?id=2259

Display a legend on your plan images.

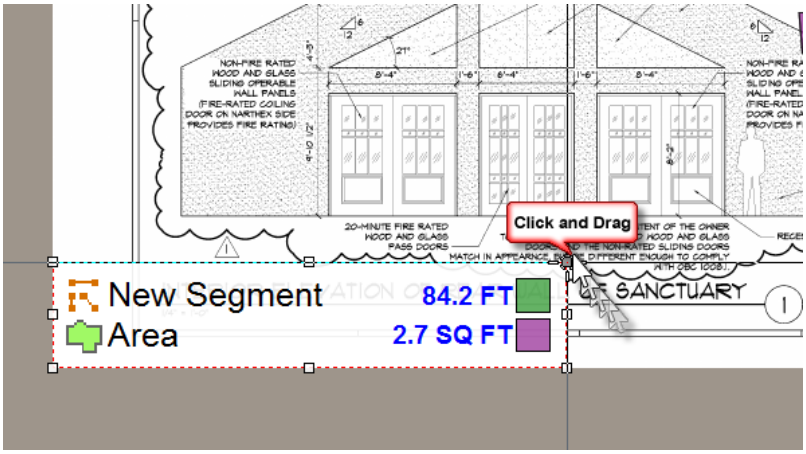
Article Number: 1796 | Rating: Unrated | Last Updated: Mar 29, 2013 at 2:33 PM

To display a legend for the takeoff that you have done on the plan image take the following steps:

1. Right click on any white space (un-digitized area) on the plan image
2. Select 'Show Legend' the check mark indicates that it is currently visible
3. Clicking a second time will hide the legend.



If the legend is visible it will print when using the Print Visible Items option on the print menu.



To resize the legend simply left click on it to select it then left click on one of the square Nodes and drag it to the desired position. Text and icons will dynamically resize.

Posted Mike Ramsey - Jul 15, 2011 at 10:24 AM. This article has been viewed 3058 times.

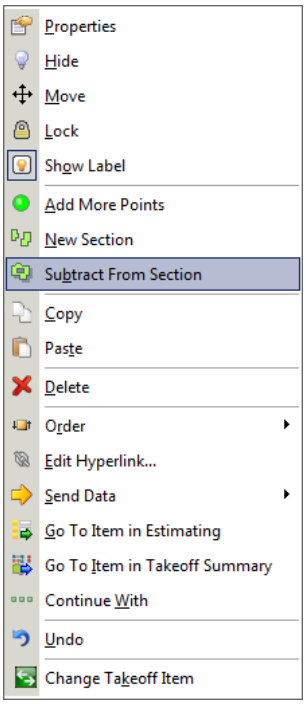
Online URL: http://www.planswift.com/phpkb/article.php?id=1796

Subtracting a Section

Article Number: 1813 | Rating: Unrated | Last Updated: Aug 18, 2011 at 11:28 AM

To subtract a section from an already existing digitized area, first select the digitized area you will be editing. Once selected, the perimeter of the digitized area should be highlighted red.

Then, right click the digitized area and select 'Subtract from Section'.



From there, continue to digitize the area you would like to remove. Please note that you must stay within the bounds of the area you are subtracting from.

To watch a video about how to subtract a section, click here.

Posted Mike Ramsey - Aug 1, 2011 at 10:21 AM. This article has been viewed 3037 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1813

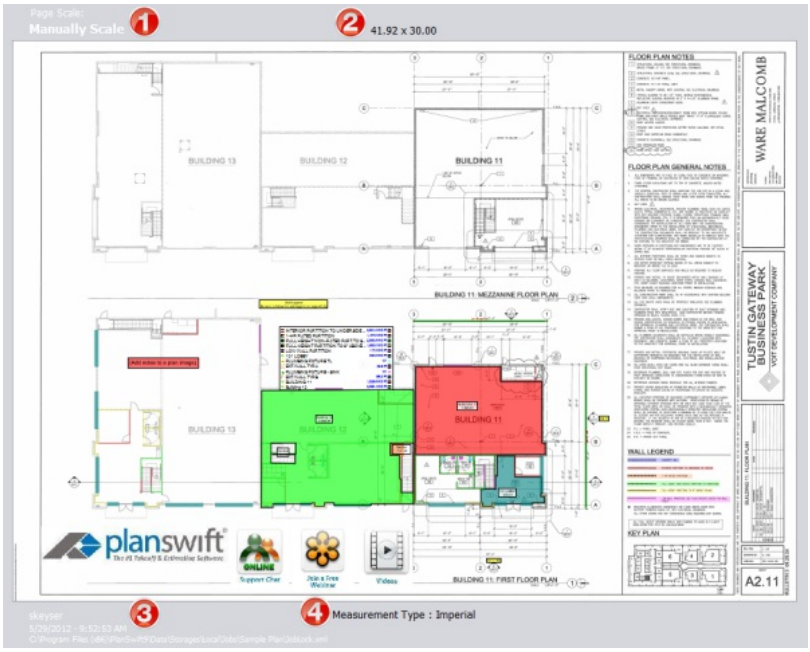
Page Information (Scale, Sheet Size, Measurement Type, User, Lock File)

Article Number: 2261 | Rating: Unrated | Last Updated: Mar 29, 2013 at 2:29 PM

In 9.3 you will find page / sheet information located around the sheet

1. Current Scale of the sheet 1/4"=1'-0", etc. (if you have selected two points to scale the sheet this area will display "Manually Scaled").
2. Actual Sheet size. This is useful for determining print size as well as scale (if the sheet size is shown actual size; 42x30 for example you can probably use a standard scale, however if this sheet size is not actual size you will probably need to manually scale the sheet, the sheet below has been manually scaled because the sheet size is off).
3. Current user as specified in the Settings > Company > User location / Date and time the current job was last opened / Location and name of the lock file (deleting the lock file listed here will unlock the sheet for editing, in case of computer failure).
4. Measurement Type: Imperial (Standard) or Metric.
    - To switch from one type to another you must first Remove the Scale and then rescale the page using the new Type.

Note: To see this information you may need to Zoom to Max or Zoom out - Click here for more information about zooming.



Posted Steven Keyser - May 29, 2012 at 4:43 PM. This article has been viewed 2892 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2261

How to Set a Page Scale

Article Number: 2250 | Rating: Unrated | Last Updated: Mar 29, 2013 at 2:33 PM

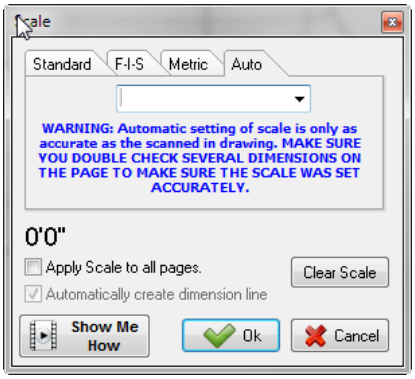
There are two methods for setting a page scale in PlanSwift. Automatic and Manual.

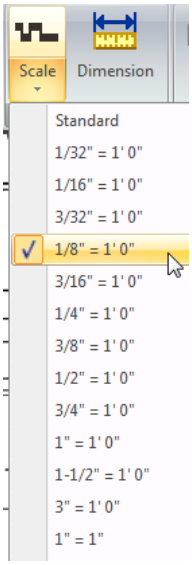
Auto Scaling

- Find the indicated scale on the page.

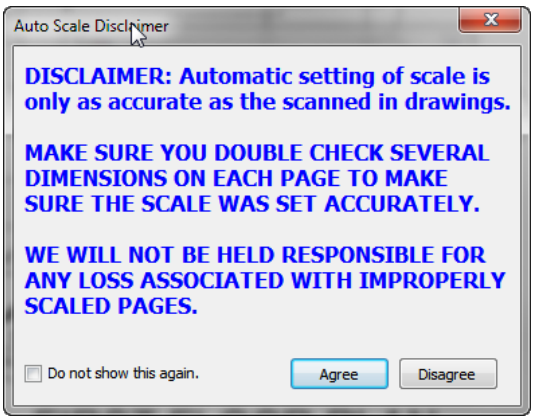
- Click the Scale button in the Home tab

- Go to the Auto section in the Scale window, or use the quick method by using the drop menu under the Scale button.


Scale
Standard
F-I-S
Metric
Auto
WARNING: Automatic setting of scale is only as accurate as the scanned in drawing. MAKE SURE YOU DOUBLE CHECK SEVERAL DIMENSIONS ON THE PAGE TO MAKE SURE THE SCALE WAS SET ACCURATELY.
0'0"
Apply Scale to all pages.
Clear Scale
Automatically create dimension line
Show Me How
Ok
Cancel



- Once you have set your scale, a disclaimer will appear indicating that if the electronic file had been altered from the original state, that the scale may not be accurate. Click accept to finalize your scale setting.


Auto Scale Disclaimer
DISCLAIMER: Automatic setting of scale is only as accurate as the scanned in drawings.
MAKE SURE YOU DOUBLE CHECK SEVERAL DIMENSIONS ON EACH PAGE TO MAKE SURE THE SCALE WAS SET ACCURATELY.
WE WILL NOT BE HELD RESPONSIBLE FOR ANY LOSS ASSOCIATED WITH IMPROPERLY SCALED PAGES.
Do not show this again.
Agree
Disagree

Note: A good habit in any instance that you're setting a scale on an image, is that once the scale has been set, use the Dimension Tool to measure one or two dimensions to ensure that the scale is accurate.

Manual Scaling - Click here for more information.

Posted Mike Ramsey - Jan 15, 2012 at 9:16 PM. This article has been viewed 2644 times.

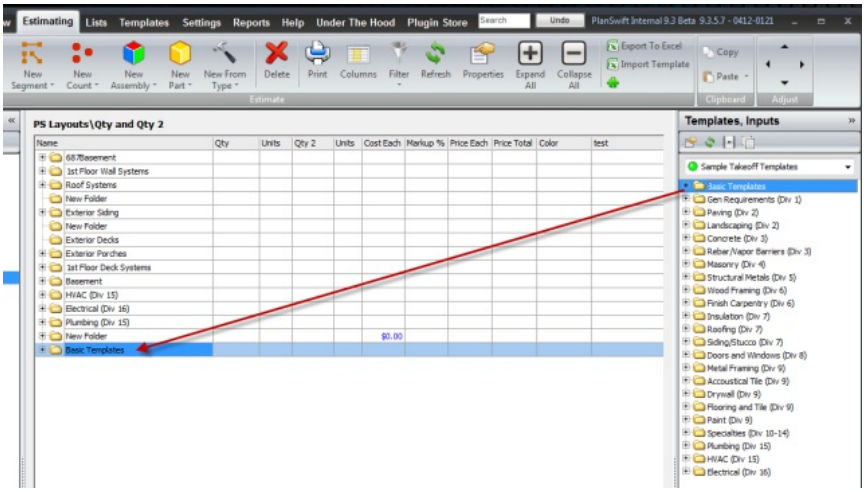
Online URL: http://www.planswift.com/phpkb/article.php?id=2250

Drag and Drop Folders from Templates to Estimating

Article Number: 2260 | Rating: Unrated | Last Updated: May 30, 2012 at 4:27 PM

This feature was added into version 9.3. It allows for the user to drag a folder from the template window and drop it and its contents into the estimate window. This function greatly improves the users ability to create specific job templates of takeoff items and parts specific to a construction sector such as but not limited to:

- Commercial
- Residential
- Multi-Family
- Hotel



Note: This is a more streamlined approach than copying and pasting from the templates tab.

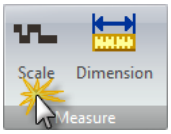
Posted Mike Ramsey - May 29, 2012 at 2:41 PM. This article has been viewed 2495 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2260

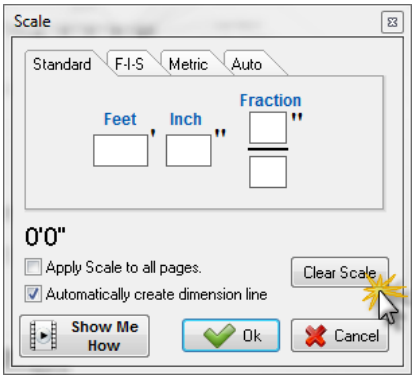
How To Remove a Scale

Article Number: 1819 | Rating: Unrated | Last Updated: May 29, 2012 at 9:19 PM

To remove a scale from a page, first make sure to select that desired page. Once you have the page selected, click on the 'Scale' button in the 'Home' tab.



Simply click the 'Clear Scale' button, and the scale will be removed from that page.



To watch a video on how to remove a scale, click here.

Posted Mike Ramsey - Aug 2, 2011 at 1:55 PM. This article has been viewed 2252 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1819

How to Use the Fill Down and Fill With

Article Number: 2290 | Rating: 4.8/5 from 4 votes | Last Updated: Sep 13, 2013 at 3:12 PM

This article will explain how to use the **Fill Down** and **Fill With** options in the right click menus on the Estimating, Templates and Reports screen.

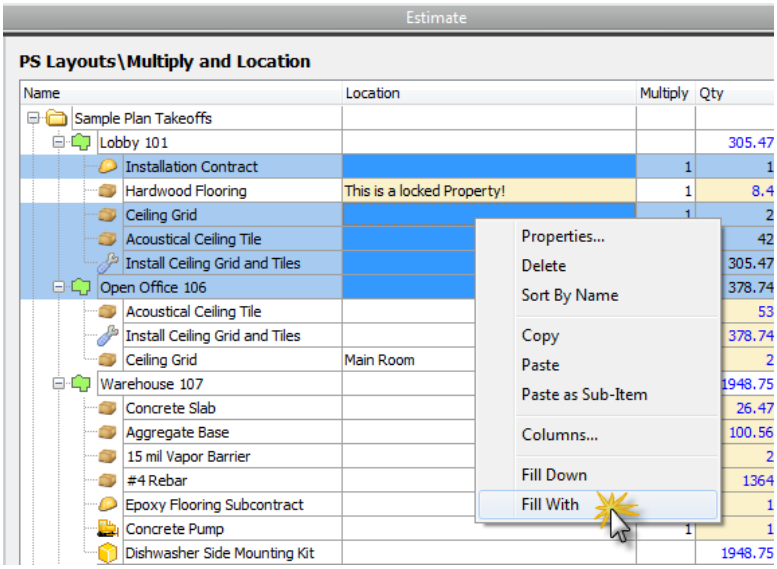
Requirements:

- PlanSwift 9.5.8.6

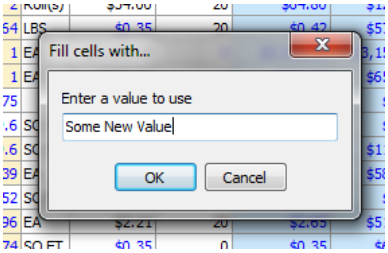
- Property must exist on the item

First select the cells in the grid that you want to update. This can be done one of two ways. Hold the **CTRL** key on your keyboard and click the cells in the column that you want to update or Click the first cell, then hold the **SHIFT** key and select the last cell to select the range.

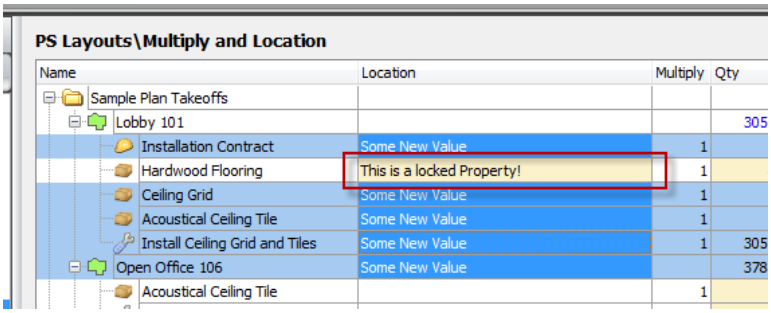
Right Click on one of the selected cells and select **Fill With.**



You will be prompted to enter a value in the dialog box.



Select **OK**. The values will update.



Take note that Locked properties will not get overwritten. If your field contains a formula that you do not want overwritten it is recommended that you lock those properties.

Repeat these steps to use the **Fill Down** option. the only difference it that it uses the value in the top most selected cell to fill the other selections.

Posted Mike Ramsey - Sep 13, 2013 at 3:12 PM. This article has been viewed 1859 times.

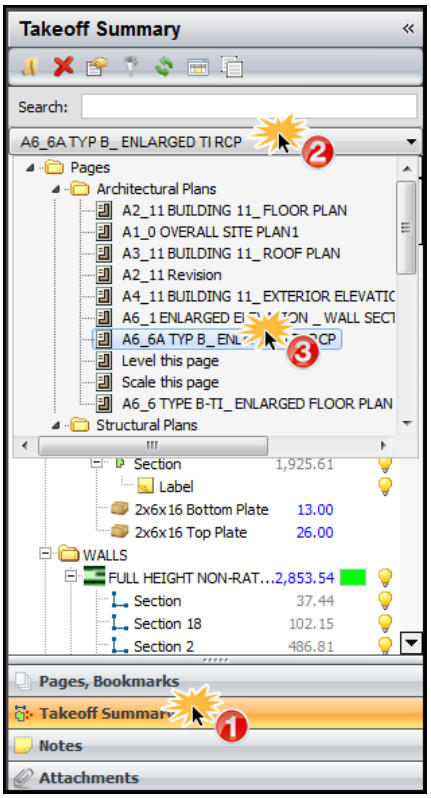
Online URL: http://www.planswift.com/phpkb/article.php?id=2290

Switch Pages from Takeoff Summary

Article Number: 2262 | Rating: Unrated | Last Updated: May 29, 2012 at 10:11 PM

Available in 9.3+.

1. In case you are not in Takeoff Summary, click takeoff summary.
2. Select the drop down box at the top of the Takeoff Summary side bar.
3. Select the page you wish to switch to.



Posted Steven Keyser - May 29, 2012 at 6:09 PM. This article has been viewed 1835 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2262

Digitizing or moving beyond the current view (zoom)

Article Number: 2258 | Rating: Unrated | Last Updated: May 25, 2012 at 9:51 PM

There may be times when you are digitizing or moving an item that the placement for the next node or the item is located out of the current view. There are a number of ways to deal with this dilemma.

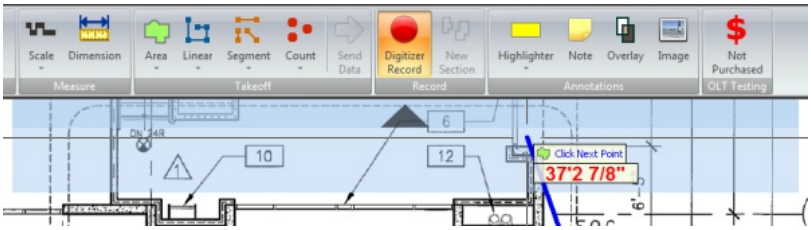
Hover Scrolling, Wheel Mouse Pan, Zoom / Pan Tool, Scroll Bars

Hover Scrolling:

1. As your mouse nears the top, right, bottom, or left of the plan / takeoff screen you will notice two transparent blocks of blue (see the Hover Scroll image below), the darker of the two has an arrow in it.
2. Hovering (not clicking) your mouse in the darker blue box will make the plan scroll quickly in the direction of the arrow.
3. Hovering your mouse in the lighter blue box will make the plan scroll slowly in the direction of the arrow.
4. While scrolling you may press the Space bar to reverse the direction of the scroll (see the Hover Scroll after Spacebar image below). This is useful if you went to far and don't want to move the mouse to the other side of the screen to scroll down.

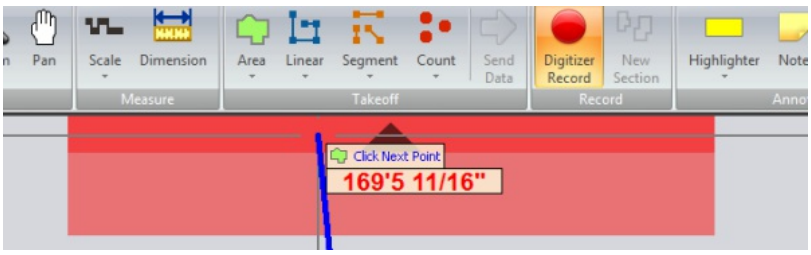
   Note: If you reach the edge of the PlanSwift drawing area you will be presented with red boxes instead of blue, this means that you cannot scroll any more in that direction (see the Red Hover image below) .

   Hover Scroll:



   Hover Scroll after Space Bar:

Red Hover:



Wheel Mouse Pan:

1. Hold your wheel mouse button down and "drag" the plan.
2. Release the button to continue digitizing or repeat step 1 to pan some more.

Pan via the Zoom / Pan tool:

1. This tool is discussed in detail in the Zoom and Pan section.

Scroll Bars:

1. On the right and the bottom of the current view you will see scroll bars. You can click and drag these scroll bars to move around the plan.

Posted Steven Keyser - May 25, 2012 at 4:06 PM. This article has been viewed 1783 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2258

Navigation

Navigation Buttons

Article Number: 1667 | Rating: 3/5 from 1 votes | Last Updated: May 25, 2012 at 8:37 PM

The navigation buttons allow you to move backwards and forward in the Pages you are working on.

'Back'-will move you to the page previous to the current page.

"Forward'-will move you to the next page.

The previous and next pages are not always the next in the list. PlanSwift goes by the pages you are viewing similar to how a web browser history works. The buttons will remain grayed out until you actually switch between pages. This way you do not need to skip pages you are not using.

Looking for Zoom / Pan - See the Zoom and Pan section.

Looking for Scrolling - See the Digitizing or moving beyond the current view (zoom) section

Posted Mike Ramsey - Aug 2, 2010 at 4:10 PM. This article has been viewed 3123 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=1667

Overview

There are no articles under this category.

Excel Integration

How to use the SwiftXL integration

Article Number: 2268 | Rating: 1.1/5 from 13 votes | Last Updated: Mar 29, 2013 at 2:28 PM

Information coming soon!

Posted Mike Ramsey - Oct 12, 2012 at 9:17 AM. This article has been viewed 2611 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=2268

Installation & Set-up

Installing PlanSwift On Your Computer

Article Number: 338 | Rating: Unrated | Last Updated: Mar 12, 2012 at 3:27 PM

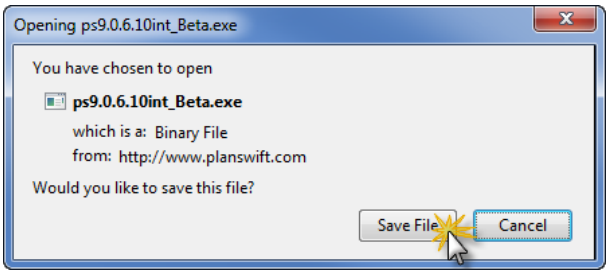
Installing PlanSwift

Installing PlanSwift on your system is fast and simple. This guide will explain how to do it.

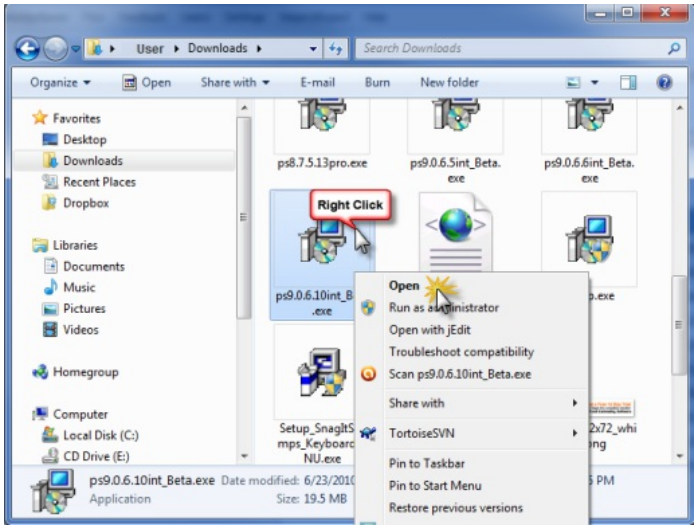
Make sure your system meets our requirements before continuing to the next step.

1. In your web browser navigate to **http://www.planswift.com** and go to the **'Download'** page if you are downloading a new trial or you can go to the **'Previous Versions'** to download the current or previously released versions.

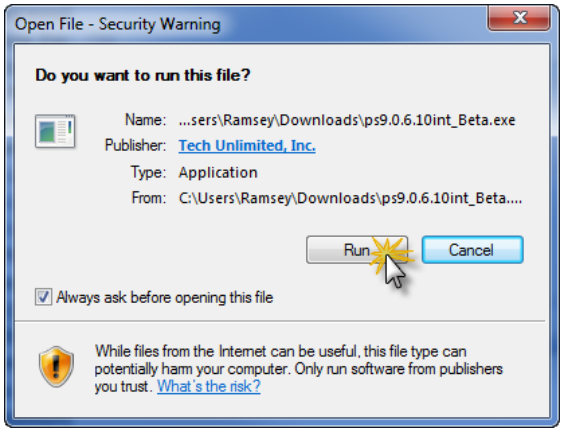
2. Once you have selected your method of download, depending on you web browser and security settings you will be prompted to 'Run' or 'Save' the excecutable file. Click Save. The file will be saved to the default location that your web browser is set to save to.



3. When the file has saved to your specified directory browse your computer to where the file is located on your hard drive. Right click on the PlanSwift executable and select 'Open'.



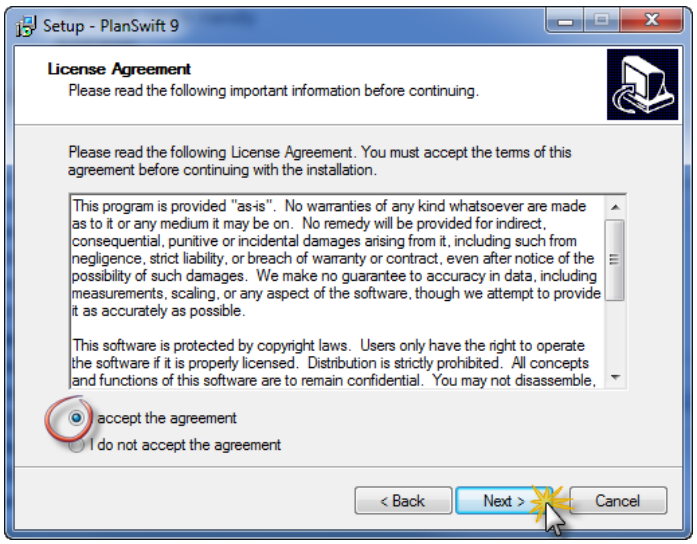
4. When prompted click 'Run'. Depending the version of Windows you are using you may receive a slightly different message here. Most users on Windows Vista or Windows 7 will likely receive the Windows 'User Access Control' warning such as "Do You want to allow the following program to make changes to your computer?" Just click 'Yes' if you receive such a message.


Open File - Security Warning
Do you want to run this file?
Name: ...sers\Ramsey\Downloads\ps9.0.6.10int_Beta.exe
Publisher: Tech Unlimited, Inc.
Type: Application
From: C:\Users\Ramsey\Downloads\ps9.0.6.10int_Beta....
Run
Cancel
Always ask before opening this file
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

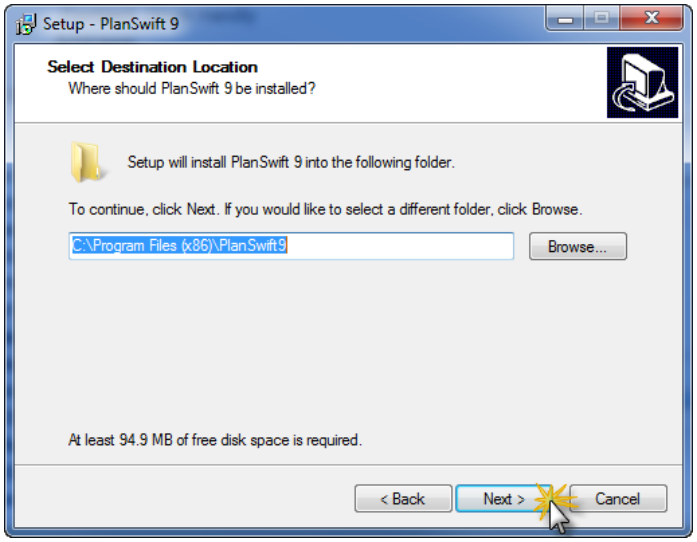
5. When the set up wizard launches click 'Next'.

Setup - PlanSwift 9
Welcome to the PlanSwift 9 Setup Wizard
This will install PlanSwift Internal 9.0 on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

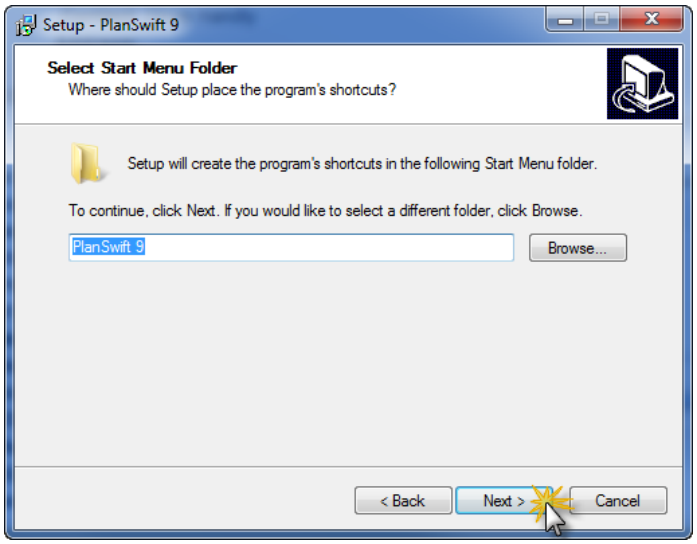
6. Accept the terms and conditions and press 'Next'.


Setup - PlanSwift 9
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
This program is provided "as-is". No warranties of any kind whatsoever are made as to it or any medium it may be on. No remedy will be provided for indirect, consequential, punitive or incidental damages arising from it, including such from negligence, strict liability, or breach of warranty or contract, even after notice of the possibility of such damages. We make no guarantee to accuracy in data, including measurements, scaling, or any aspect of the software, though we attempt to provide it as accurately as possible.
This software is protected by copyright laws. Users only have the right to operate the software if it is properly licensed. Distribution is strictly prohibited. All concepts and functions of this software are to remain confidential. You may not disassemble,
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

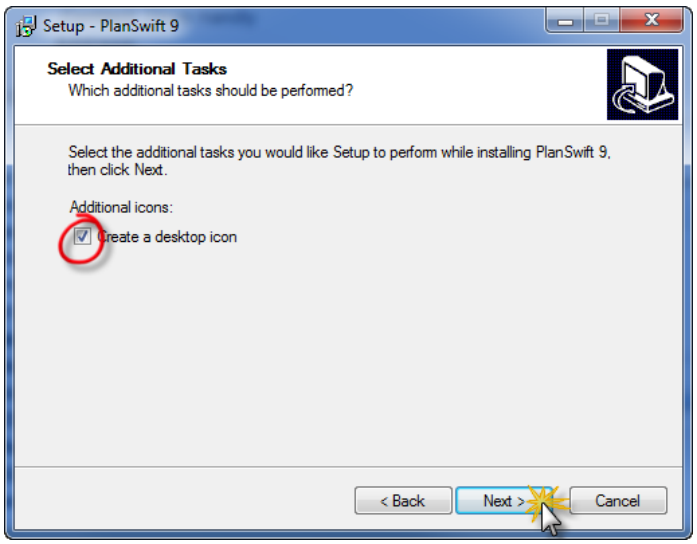
7. Either use the default installation directory **(recommended)** or select your desired directory and click 'Next'.
Note: *The installation must be on your local hard drive. You cannot install PlanSwift to a remote drive, external hard drive or thumb drive!*


Setup - PlanSwift 9
Select Destination Location
Where should PlanSwift 9 be installed?
Setup will install PlanSwift 9 into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files (x86)\PlanSwift 9
Browse...
At least 94.9 MB of free disk space is required.
< Back
Next >
Cancel

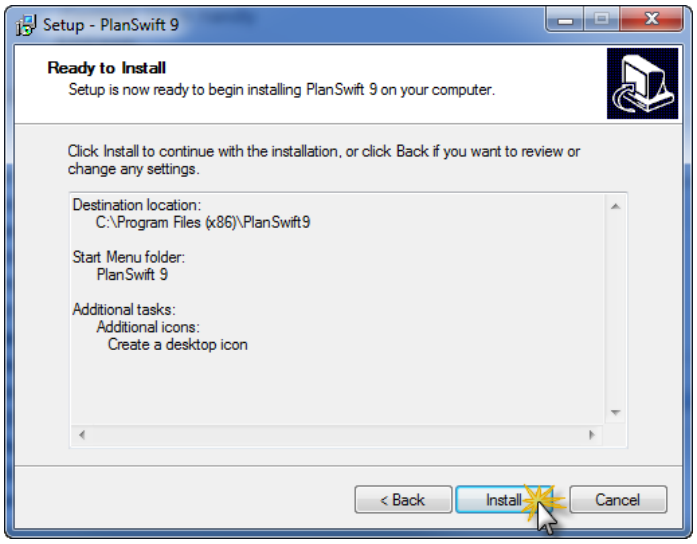
8. Select your Start Menu folder location if desired. Click 'Next'.


Setup - PlanSwift 9
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
PlanSwift 9
Browse...
< Back
Next >
Cancel

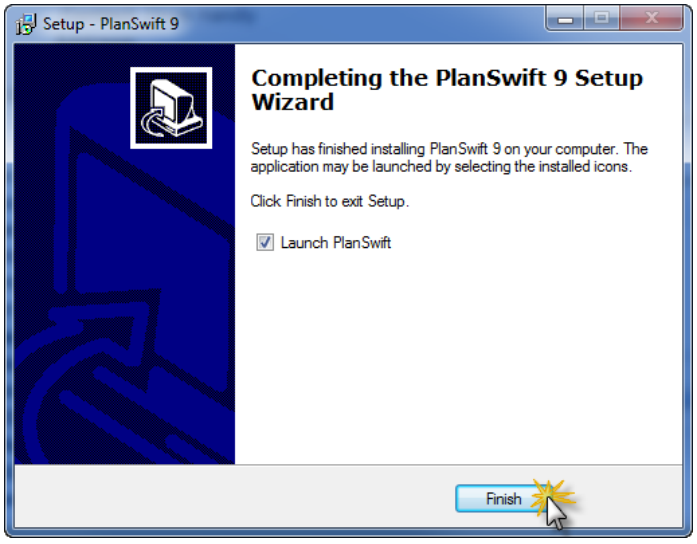
9. Select the option to place an icon on your desktop. Click 'Next'.


Setup - PlanSwift 9
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing PlanSwift 9, then click Next.
Additional icons:
Create a desktop icon
< Back
Next >
Cancel

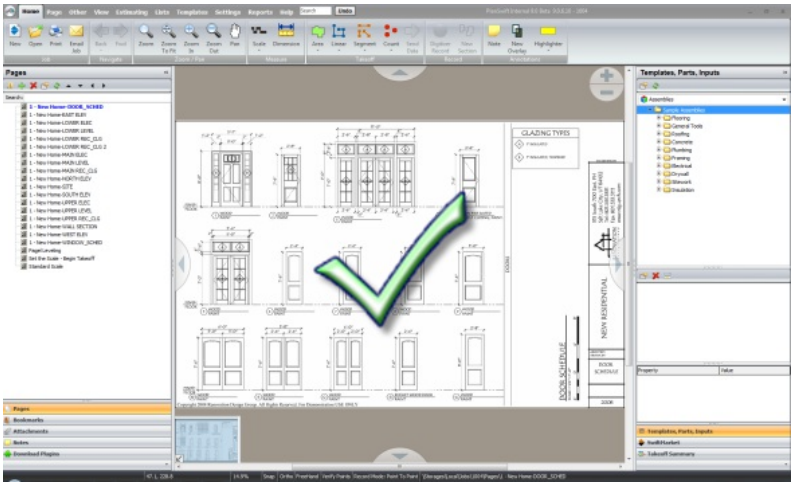
10. Review your installation options and click 'Install'. If you made a mistake simply click the 'Back' button to go back to the previous screens.


Setup - PlanSwift 9
Ready to Install
Setup is now ready to begin installing PlanSwift 9 on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files (x86)\PlanSwift9
Start Menu folder:
PlanSwift 9
Additional tasks:
Additional icons:
Create a desktop icon
< Back
Install
Cancel

11. Once the setup has finished click the Finish button to launch PlanSwift.

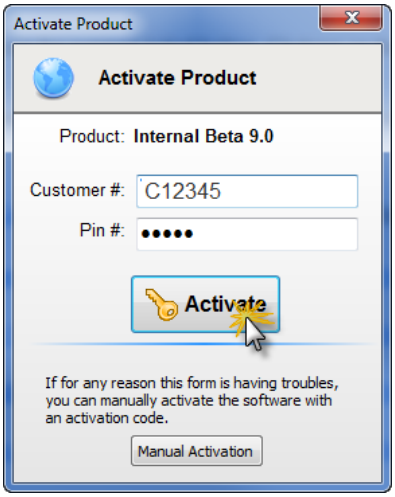

Setup - PlanSwift 9
Completing the PlanSwift 9 Setup Wizard
Setup has finished installing PlanSwift 9 on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Launch PlanSwift
Finish

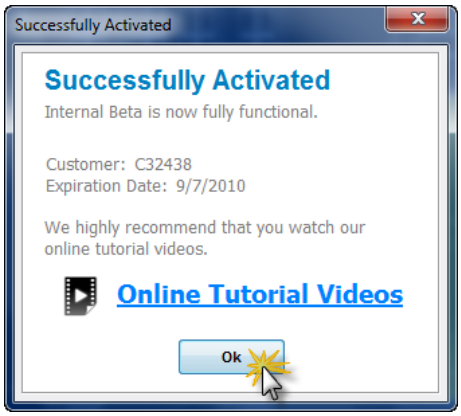
Congratulations - PlanSwift has been installed!



Unlocking PlanSwift

Once PlanSwift has been installed and run for the first time you will be prompted to activate the software. Just enter the Customer and PIN numbers you received when you received your trial or purchase.


Activate Product
Activate Product
Product: Internal Beta 9.0
Customer #: C12345
Pin #: •••••
Activate
If for any reason this form is having troubles, you can manually activate the software with an activation code.
Manual Activation



Posted Mike Ramsey - Jun 23, 2010 at 2:12 PM. This article has been viewed 3166 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=338

Applying Software Updates

Article Number: 339 | Rating: Unrated | Last Updated: May 24, 2012 at 8:30 PM

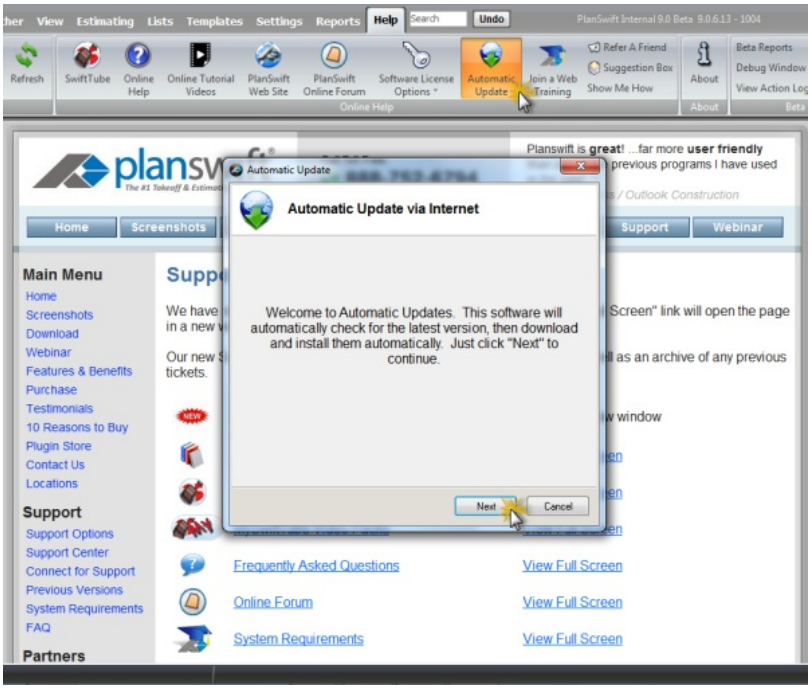
Software Updates

Applying updates to PlanSwift is simple and fast. This quick guide will show you how to do it.

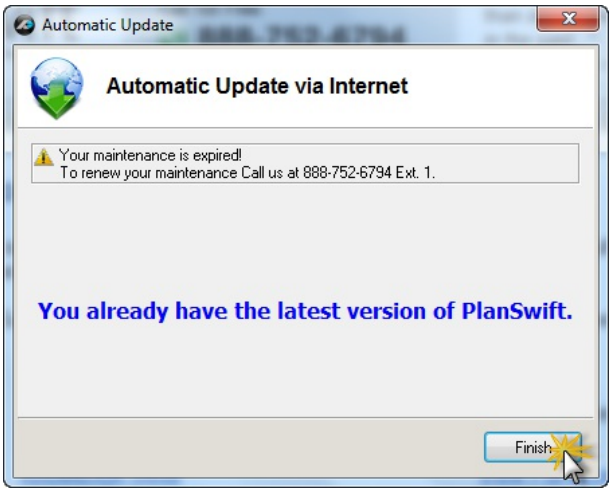
1. Select the 'Help' tab along the top of your screen.

2. Select the 'Automatic Update' button. This will cause the update screen to open.

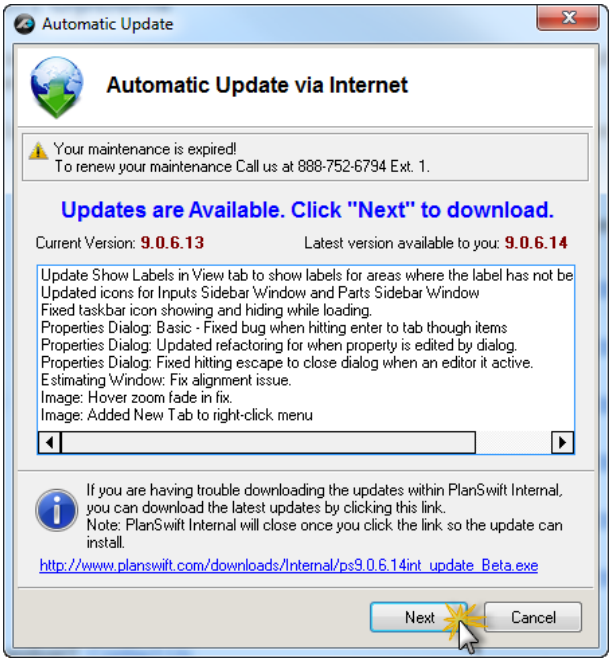
3. Select 'Next'. PlanSwift will automatically check for updates. If your copy needs updating you will asked to update. Otherwise you will be shown you have the latest copy.



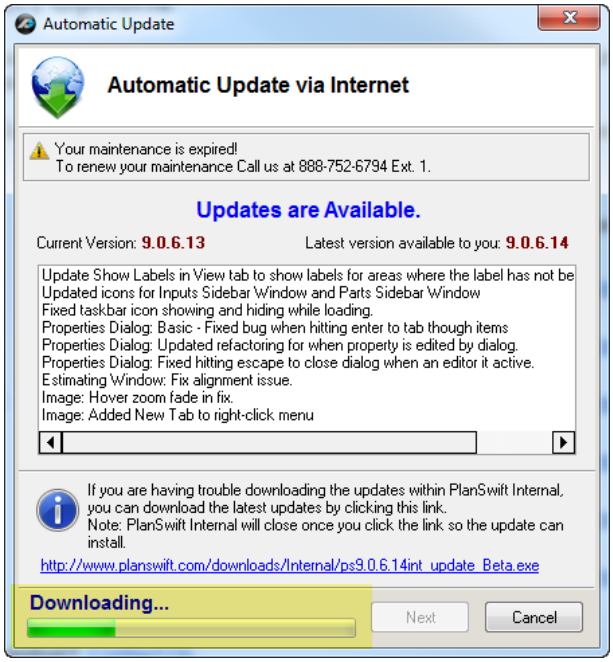
4. If you are already up to date click 'Finish' to end the updates **OR** if you need updates you will be shown what updates need installed.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
You already have the latest version of PlanSwift.
Finish

5. Click 'Next' to download updates to your computer. You can follow the progress of the updates with the download bar.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
Updates are Available. Click "Next" to download.
Current Version: 9.0.6.13
Latest version available to you: 9.0.6.14
Update Show Labels in View tab to show labels for areas where the label has not be
Updated icons for Inputs Sidebar Window and Parts Sidebar Window
Fixed taskbar icon showing and hiding while loading.
Properties Dialog: Basic - Fixed bug when hitting enter to tab though items
Properties Dialog: Updated refactoring for when property is edited by dialog.
Properties Dialog: Fixed hitting escape to close dialog when an editor it active.
Estimating Window: Fix alignment issue.
Image: Hover zoom fade in fix.
Image: Added New Tab to right-click menu
If you are having trouble downloading the updates within PlanSwift Internal, you can download the latest updates by clicking this link.
Note: PlanSwift Internal will close once you click the link so the update can install.
http://www.planswift.com/downloads/Internal/ps9.0.6.14int_update_Beta.exe
Next
Cancel

6. Click 'Next' to begin the installation process. Follow the prompts to allow the program to install the updates.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
Updates are Available.
Current Version: 9.0.6.13
Latest version available to you: 9.0.6.14
Update Show Labels in View tab to show labels for areas where the label has not be
Updated icons for Inputs Sidebar Window and Parts Sidebar Window
Fixed taskbar icon showing and hiding while loading.
Properties Dialog: Basic - Fixed bug when hitting enter to tab though items
Properties Dialog: Updated refactoring for when property is edited by dialog.
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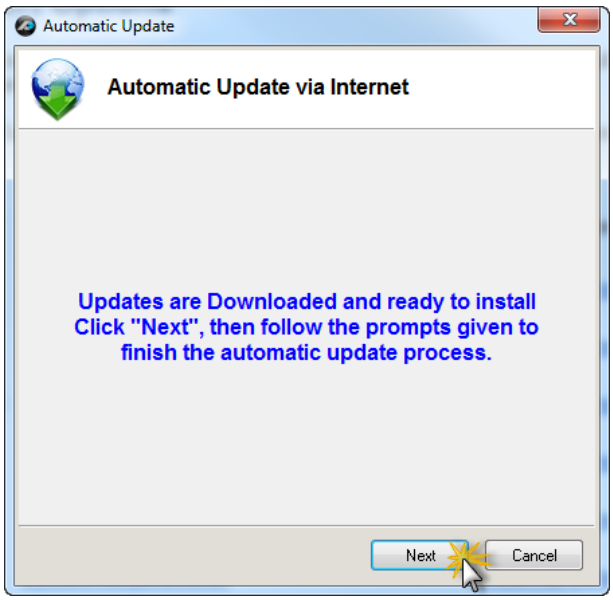
Estimating Window: Fix alignment issue.
Image: Hover zoom fade in fix.
Image: Added New Tab to right-click menu
If you are having trouble downloading the updates within PlanSwift Internal, you can download the latest updates by clicking this link.
Note: PlanSwift Internal will close once you click the link so the update can install.
http://www.planswift.com/downloads/Internal/ps9.0.6.14int_update_Beta.exe
Downloading...
Next
Cancel

7. PlanSwift will automatically restart with the latest updates working.


Automatic Update
Automatic Update via Internet
Updates are Downloaded and ready to install
Click "Next", then follow the prompts given to
finish the automatic update process.
Next
Cancel

To watch a video about program updating, click here.

Posted Mike Ramsey - Jun 28, 2010 at 5:02 PM. This article has been viewed 1960 times.

Online URL: http://www.planswift.com/phpkb/article.php?id=339